

nextail

Running an Optimisation & Adding Inputs

November 2020

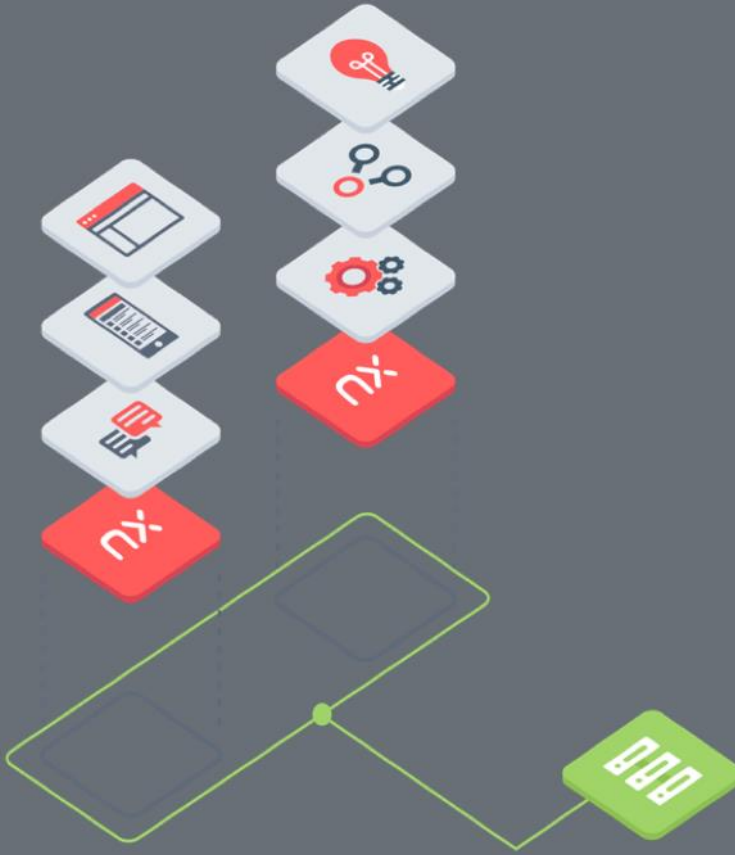
Private and confidential





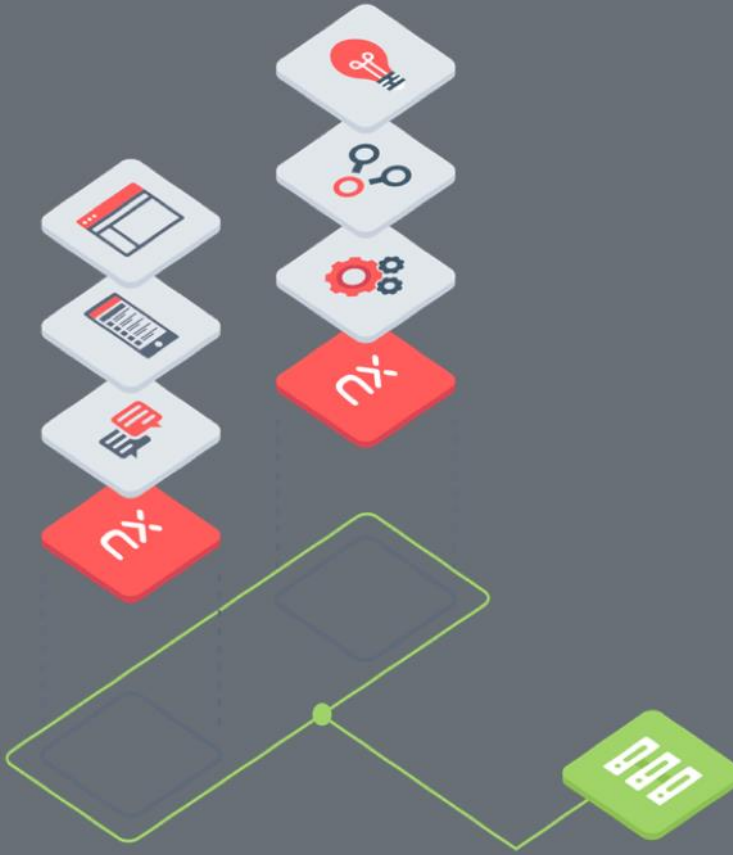
At the end of this session we will expect you to

- Understand how Nextail uses categories to give flexibility on data management by stores & products
- Be able to run a Replenishment optimisation
- Review & download results of a Replenishment 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** Replenishment Optimisations
- 3** Inputting data into the platform
- 4** Next steps

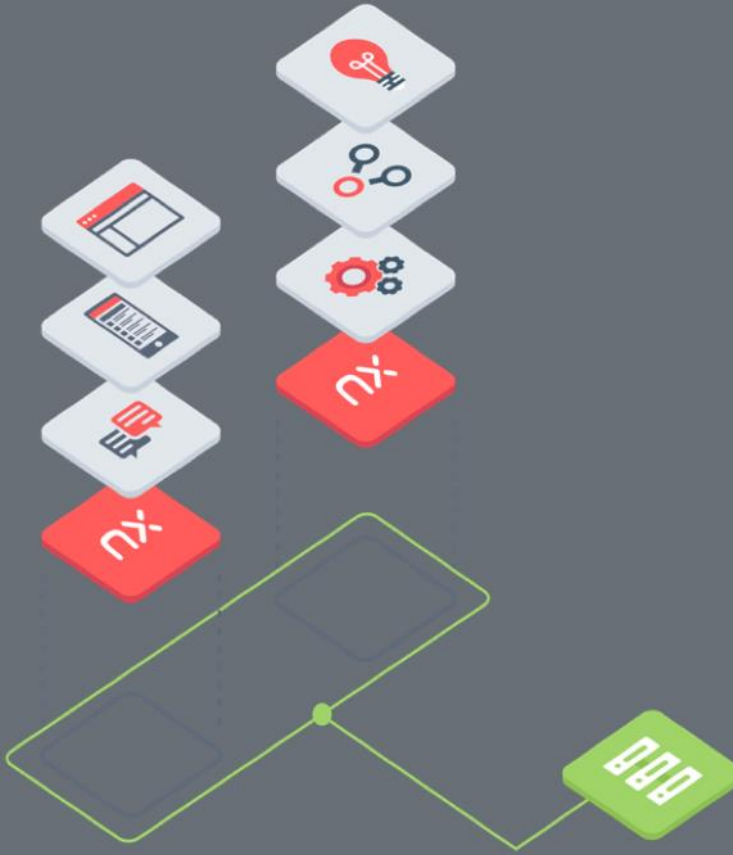


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*Through Nextail's platform you will have access to **big data** and you have the power to run dummy replenishment **executions at scale**.*

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



Content

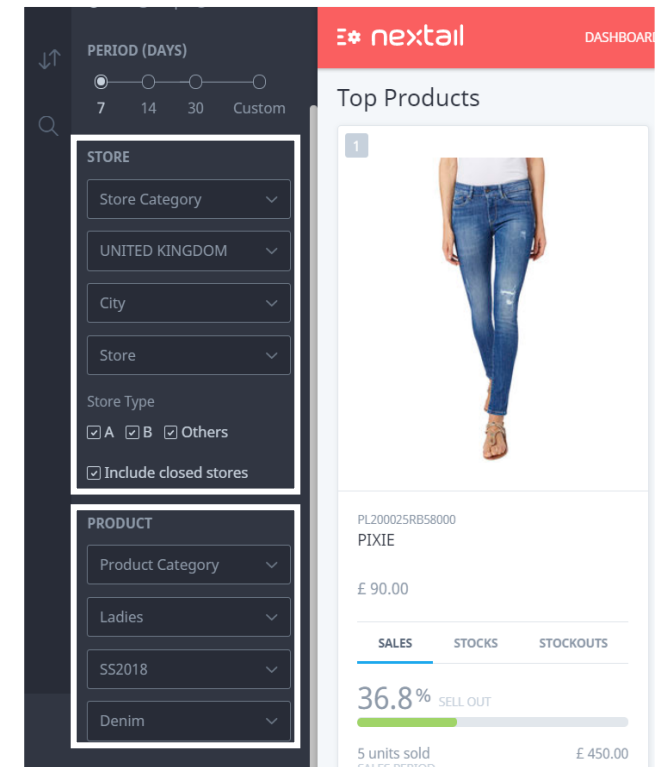
- 1** **Category Management**
 - 1** **Type of categories**
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Grouping products or stores within Categories allows us to take actions and view data at an aggregated level

There are two types of categories within the Nextail platform

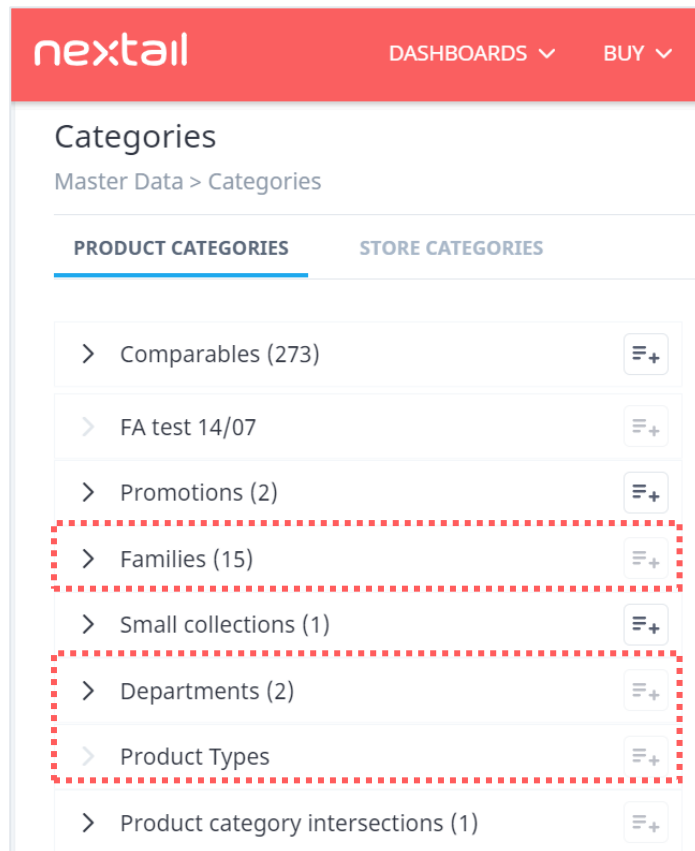
- **Automatic categories:** created based on product or store attributes shared in the master files
 - Created automatically
 - Updated automatically everyday
- **Manual categories:** created ad-hoc when we need to group a selection of stores or products
 - Created by Nextail per customer request
 -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

Example of filters in Top Products report:

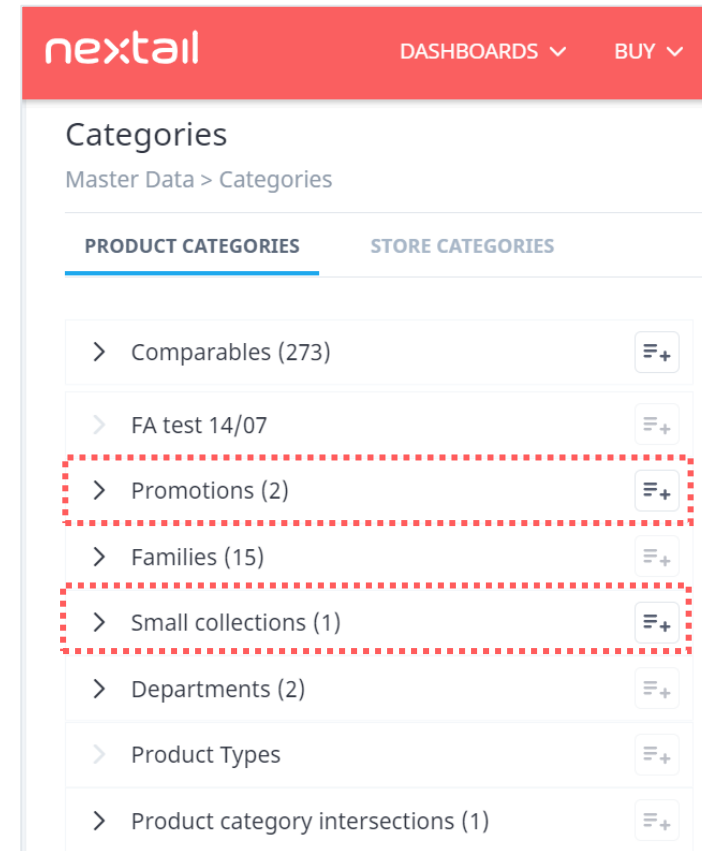


Product categories allow us to see data aggregated by departments, collections or any combination of products

- Automatic categories: Families, Departments, Product types

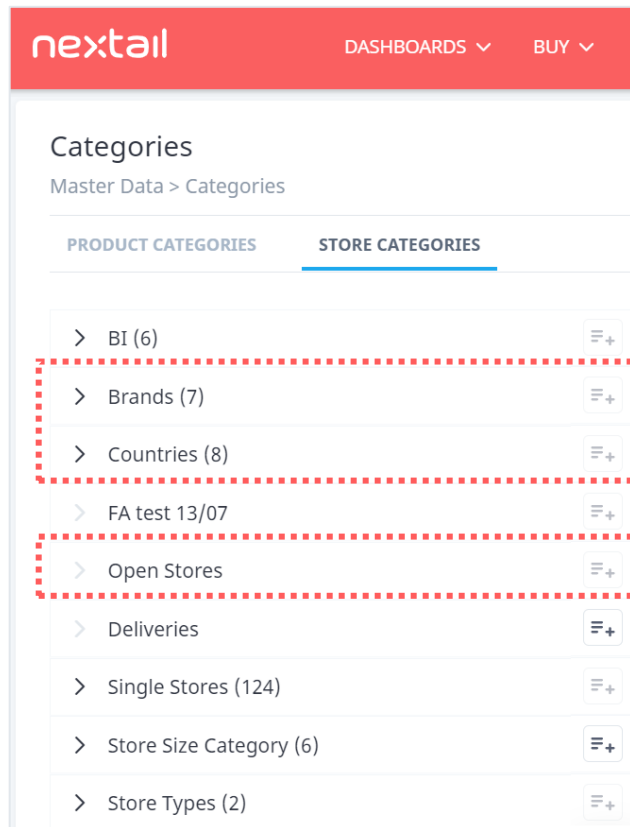


- Manual categories: promotions, small collections

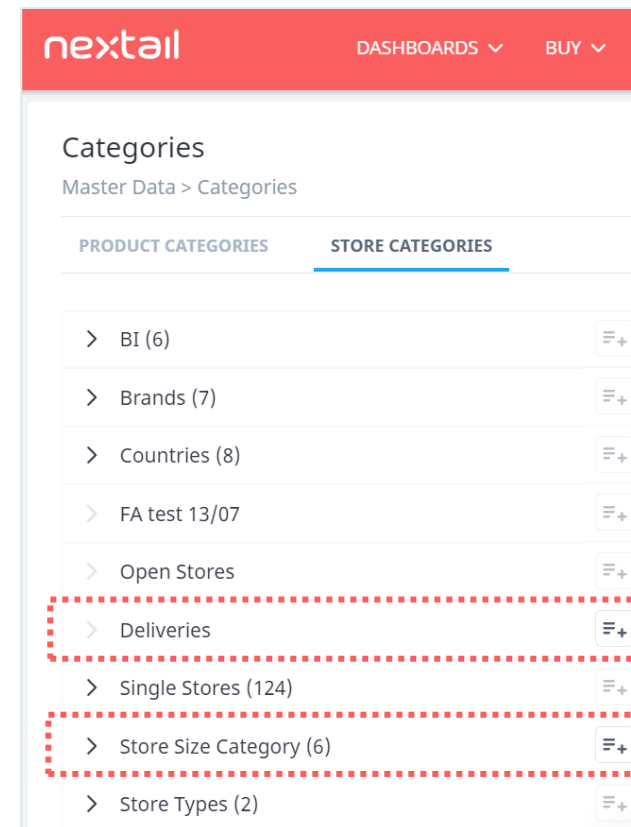


Store categories allow us to see data aggregated by countries, store sizes or any combination of stores

- Automatic categories: brands, countries, open stores

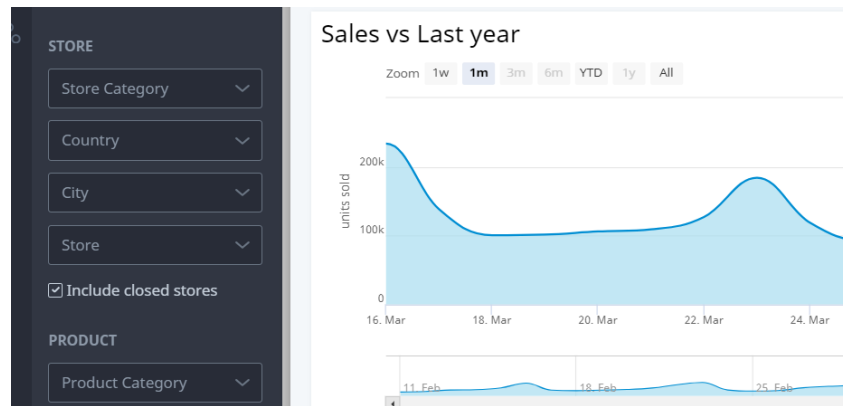


- Manual categories: deliveries, store size category



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

Viewing data within the dashboard



Running dummy scenarios

Parameter input

REPLENISHMENT SCOPE

Brand: Default | Warehouse: 9001 | Master section: Any | Season: Any

Calendar Plan: Replenishment Calendar

Product category: Jersey Tops and Bottoms | Store category: Open Stores

Downloading relevant data from the platform

The "Blockages" table shows a list of items with their status and family. The left sidebar contains filters for STORE (Store Category, Country, City) and PRODUCT (Product Category, Section). There are "Block" and "Unblock" buttons at the top. The table has columns for STATUS, PRODUCTS, and FAMILY.

	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

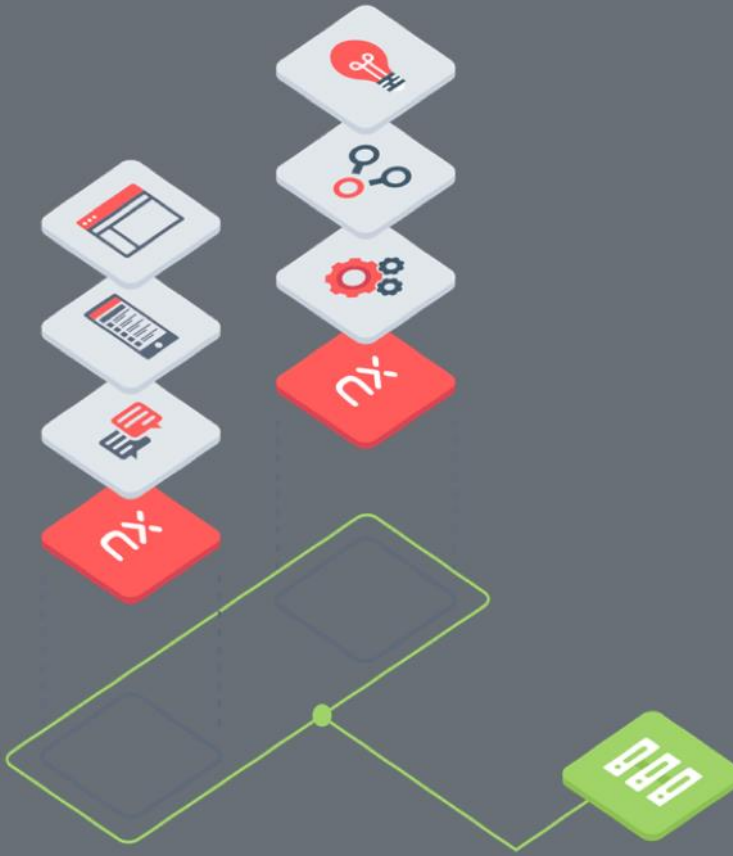
Creating promotions

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”**

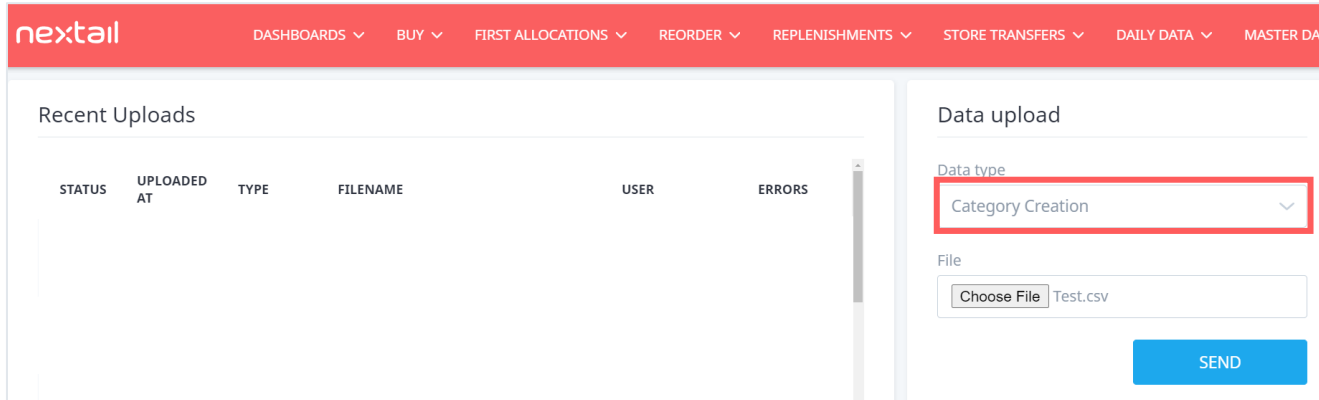
The screenshot shows the Nextail interface. At the top, there is a navigation bar with the Nextail logo and several menu items: DASHBOARDS, BUY, FIRST ALLOCATIONS, REORDER, REPLENISHMENTS, STORE TRANSFERS, and DAILY. Below the navigation bar, the main content area is titled 'Categories' and includes the breadcrumb 'Master Data > Categories'. There are two tabs: 'PRODUCT CATEGORIES' (active) and 'STORE CATEGORIES'. A list of categories is displayed, 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 is visible next to it. To the right, a modal window titled 'Create child category' is open, showing 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.



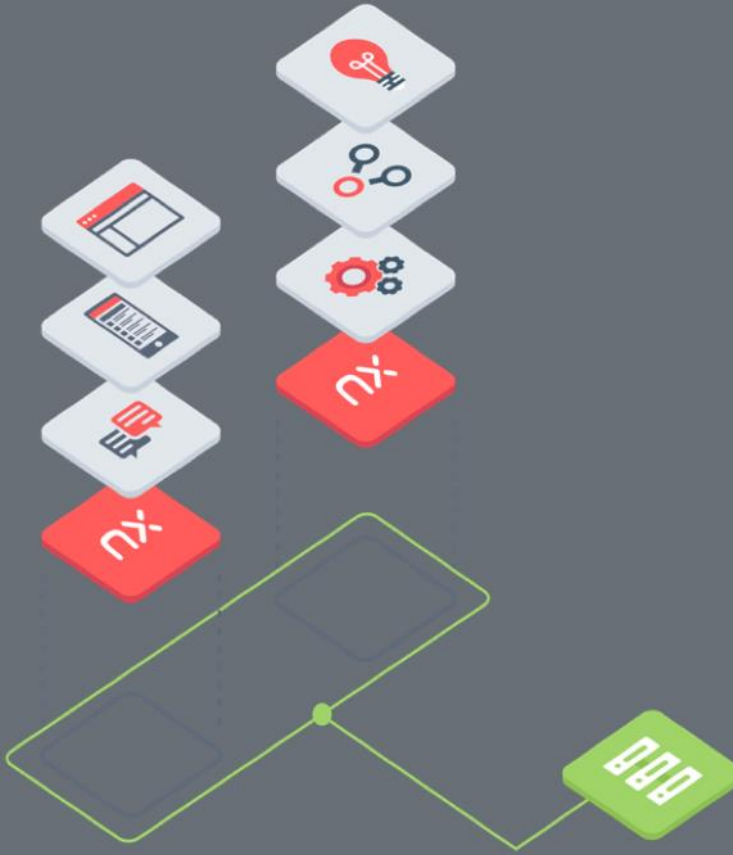
- The file must contain the following columns:

	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

The screenshot shows the Nextail web application interface. On the left, a navigation menu is visible with 'Products' highlighted. The main content area displays the 'Products' page with a table of product data. A modal window titled 'Bulk Category Assign' is open, showing a dropdown menu for 'Product Category' with 'Productos hombre' selected, and a text area for 'Products' containing a list of product references: 'XXXXX', 'YYYYY', and 'ZZZZZ'. The 'Submit' button in the modal is highlighted.

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			

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.

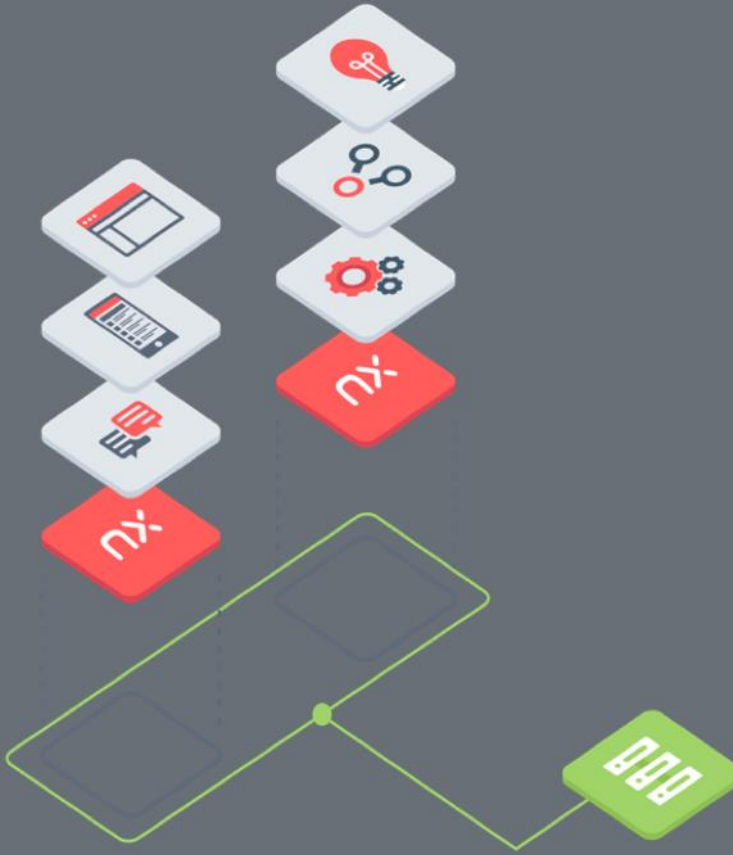
Also make editions by adding or removing within the category on the category items page

- 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.

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 in red. The 'Category changes' panel on the right shows 'ITEMS TO BE REMOVED - 1' (DRESS 77597) and 'ITEMS TO BE ADDED - 1' (COATS&JACKETS 72325), with a 'Save' button highlighted in green.

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

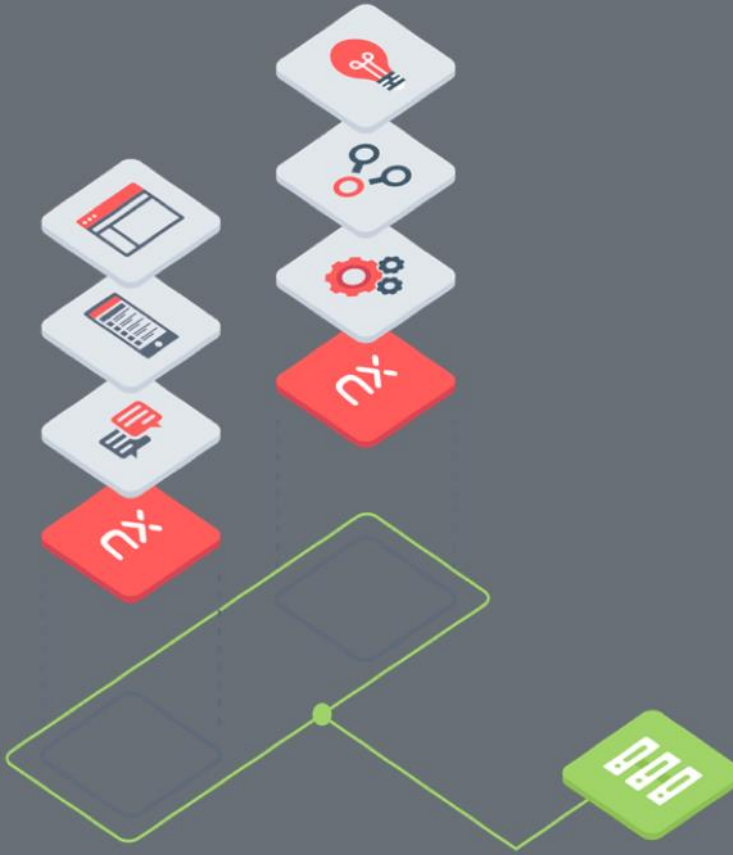


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A *Replenishment optimisation* is a replenishment process that you run through Nextail's platform

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



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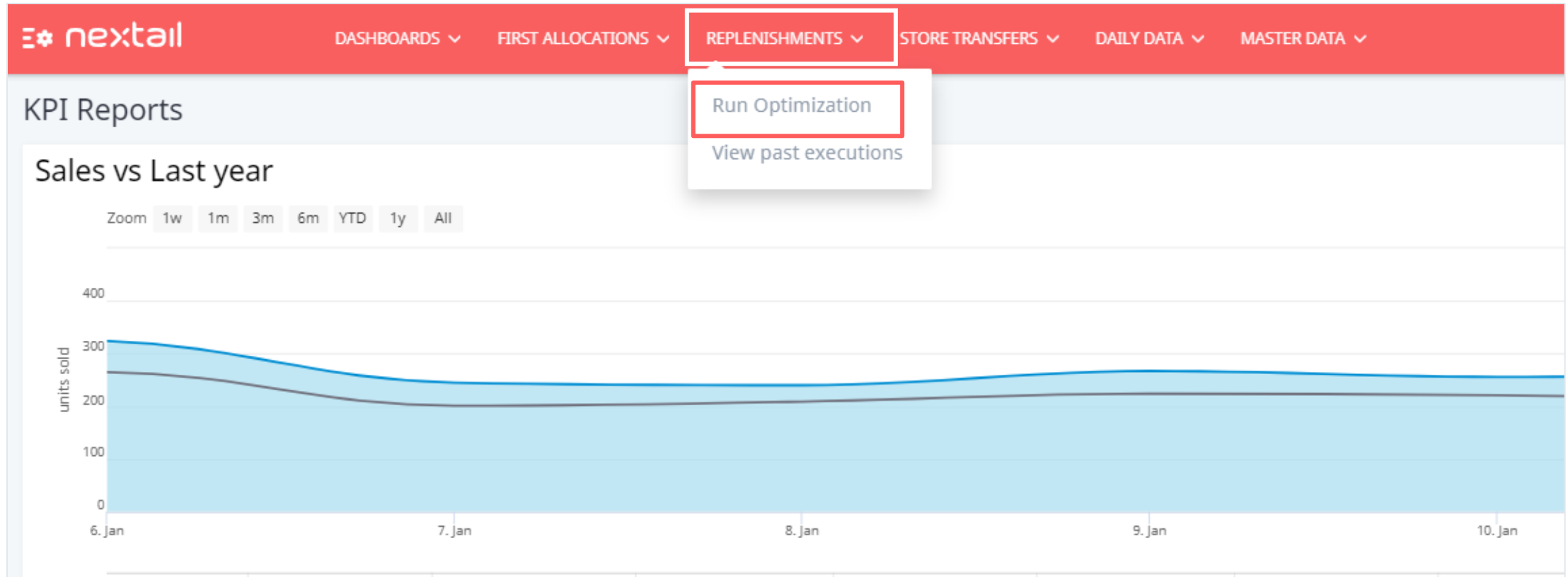
Replenishment optimisations are scheduled to be launched automatically at predefined times

POSITION	NAME	CALENDAR	EXECUTION TYPE
0	Daily W2	[MON] [TUE] [WED] [THU] [FRI] [SAT] [SUN]	Daily
0	Daily W1	[MON] [TUE] [WED] [THU] [FRI] [SAT] [SUN]	Daily
0	Daily W3	[MON] [TUE] [WED] [THU] [FRI] [SAT] [SUN]	Daily
0	Daily W4	[MON] [TUE] [WED] [THU] [FRI] [SAT] [SUN]	Daily
0	Daily W5	[MON] [TUE] [WED] [THU] [FRI] [SAT] [SUN]	Daily
0	Daily W6	[MON] [TUE] [WED] [THU] [FRI] [SAT] [SUN]	Daily

These executions are configured by Nextail team but can be created or modified if needed

Replenishment results (waybills) are sent automatically after the executions. Waybills will be converted into ODBMS transfers and warehouse will start working on picking

You can also run an optimisation by going to the “Replenishments” tab on the platform



The launch screen shows the “default” parameterization previously agreed with Nextail; users can decide to modify it or not

The screenshot shows a web interface titled "Run optimization". It is divided into two main sections: "Parameter input" and "FORECAST PARAMETERS".

Parameter input (Section 1):

- REPLENISHMENT SCOPE:** Includes dropdown menus for Brand (ACME), Warehouse (LOONEY WH), Master section (DEMO), and Season (Any).
- Calendar Plan:** A dropdown menu set to "Default Plan".
- Product category** and **Store category:** Empty dropdown menus.

FORECAST PARAMETERS (Section 2):

- Planning horizon:** Input field with value 10.
- Forecast weeks:** Input field with value 3.
- Planning horizon by store
- Same weight for all weeks
- Week 1:** Input field with value 20
- Week 2:** Input field with value 30
- Week 3:** Input field with value 50

Section 3: A blue "Calculate" button with a right-pointing arrow.

1 | Define the scope of your replenishment optimisation:

- *Brand*
- Warehouse
- Master section
- Season
- Calendar plan
- Product and Store categories

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

- Planning horizon
- Forecast weeks and weight for each week (%)

3 | Begin replenishment calculation process

Forecast parameters have been defined at department group level.
In order to change it you need to contact Nextail team but you can run dummy scenarios using other values

You can also relaunch a new execution with the same parametrization from an existing scenario

The screenshot shows the 'Replenishment Executions' page in the Nextail application. The page has a red header with the 'nextail' logo and navigation menus for DASHBOARDS, FIRST ALLOCATIONS, REPLENISHMENTS, STORE TRANSFERS, DAILY DATA, MASTER DATA, and ADMIN. A green 'NEW EXECUTION' button is in the top right. The main content area is titled 'Replenishment Executions' and includes a search bar and filters for Status (All), User (pedro@nextail.co), and an 'Exclude automatic executions' checkbox. A table lists two scenarios. The first scenario is highlighted, and a red box labeled '2' highlights a double circular arrow icon in its 'Units' column. A dialog box labeled 'Relaunch execution' is open, showing a 'RELAUNCH' button highlighted with a red box labeled '3'.

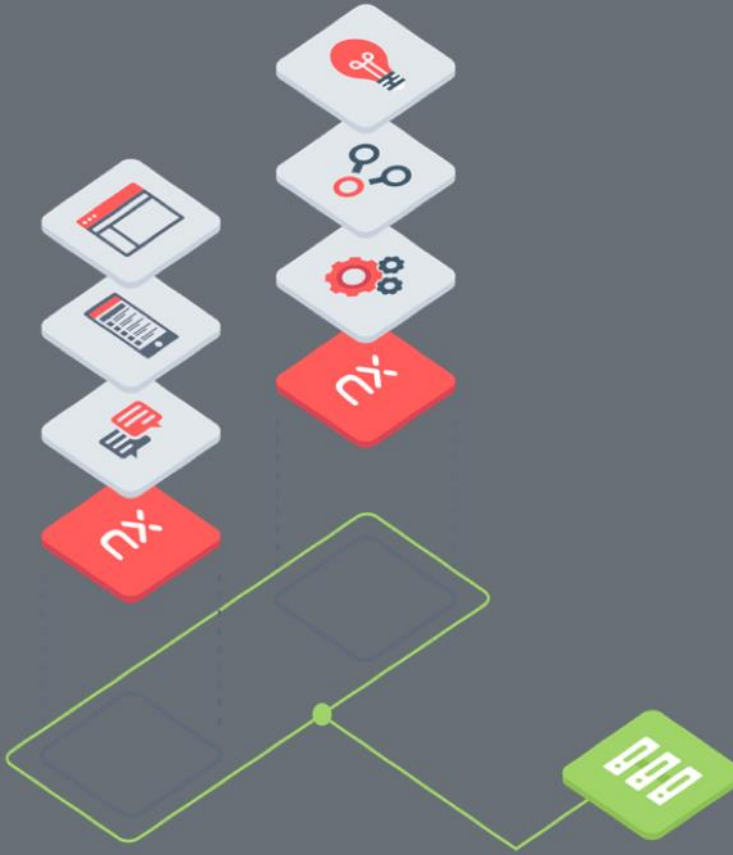
Status	Scenario ID	User	Date	Calendar plan	Planning Horizon	Product category	Store category	Units
Processed	18360	pedro@nextail.co	Jul 29, 2020 3:35 PM	First Allocation	14	SS20 >Seasons	Open Stores	72
Processed	18359	pedro@nextail.co	Jul 29, 2020 3:32 PM	Default Plan	12	SS20 >Seasons	Open Stores	39

Relaunch execution

This process will generate a replenishment scenario with the same parametrization

CANCEL **RELAUNCH**

- 1| Go to View past executions page
- 2| Hover over the scenario you have selected and click on the double circular arrow icon
- 3| Click the "Relaunch" button

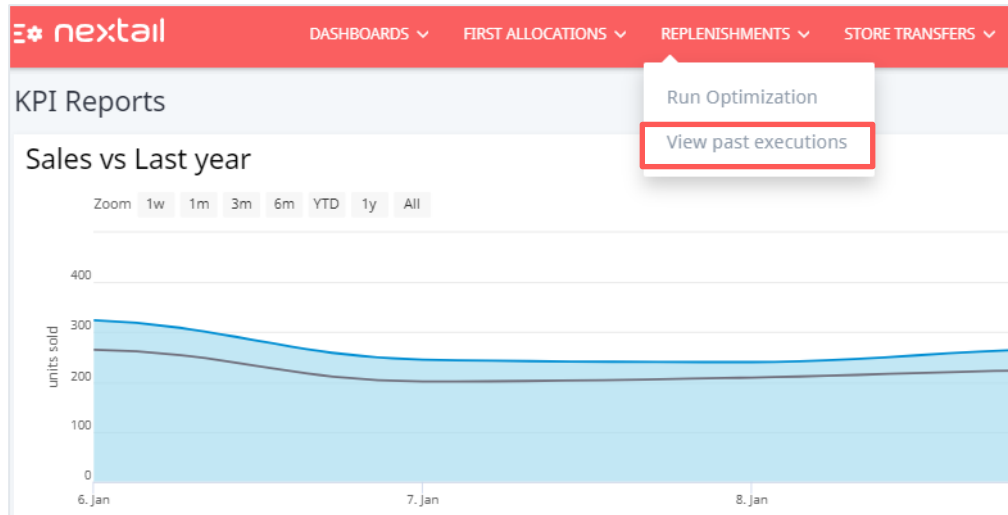


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Optimisation results can be reviewed in the “View past executions” option within the “Replenishments” menu

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



2| Select the desired execution from the list and click on the scenario to see it in detail:

Replenishment Executions

Choose an scenario to review

NEW EXECUTION

Status: All User: All users Exclude automatic executions Search:

Status	Scenario ID	User	Date	Calendar plan	Planning Horizon	Product category	Store category	Units
Processed	3010	virginia@nextail.co	May 26, 2020 10:49 AM	Default Plan	7			0
Processed	2812	alexandra@nextail.co	Nov 5, 2019 3:50 PM	Default Plan	7	Similar to Skirt 11		990

Optimisation results can be downloaded in two formats

3| After clicking on a “Scenario Id” number, the possibility to download both the results file and the waybills (*) will appear:

Replenishment execution

SUMMARY

152 STORES Send to warehouse

35864 UNITS 3009 SKUS

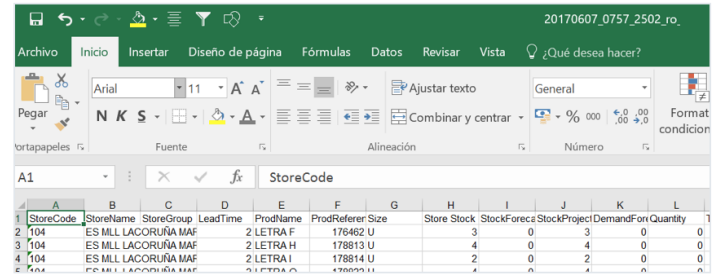
-- COVERAGE BEFORE -- COVERAGE AFTER

WARNINGS

FILES

a Download RESULTS FILE **b** Download WAYBILLS FILE

a Download RESULTS FILE



b Download WAYBILLS FILE

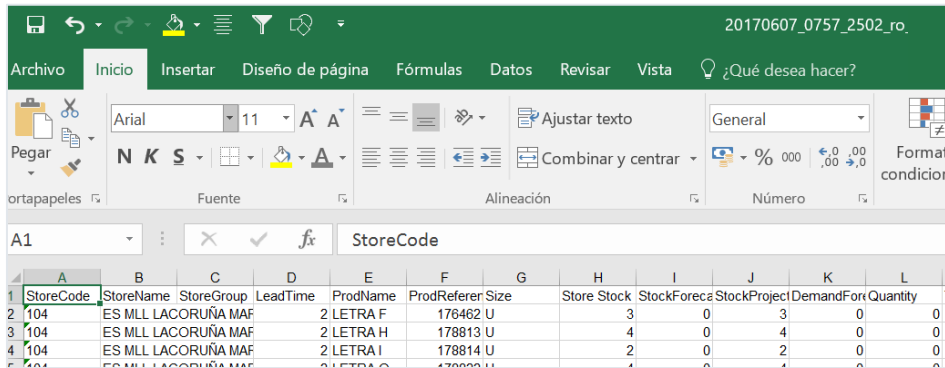
```
"createddate": "03/05/2019",  
"filetype": "early",  
"replenlines": [  
  {  
    "sku": "5444547",  
    "store": 1,  
    "quantity": 1  
  },  
  {  
    "sku": "5530201",  
    "store": 1,  
    "quantity": 1  
  },  
  {  
    "sku": "5603813",  
    "store": 163,  
    "quantity": 1  
  },  
],
```

(*) Nextail can set different formats for data download (.txt, .csv, .xls...)

Send to Warehouse button can be disabled to prevent users from submitting manual executions

The Excel file is what we call a Replenishment Order. This file contains all detail at store-SKU level

a Download RESULTS FILE



Users can use the RO file to review replenishment results and change parametrization as needed. In the Appendix of this document, there is an explanation of all the fields of RO file.

Store Code	StoreName	Lead Time	ProdName	Prod Reference	Size	Store Stock	Stock Forecasts	Stock Projection	Demand Forecasts	Quantity	Total	Wh stock (After repl.)	Family	Agr %	Available Date	Key Size?	Waybills	Store Demand	Product-Store	Id
A0005	ACME STORE 0005	1	DEMO DRESS 05	A-03103021	4	0	0,8836	0	1,6467	10	10	12	DRESSES	0	11/09/2016	FALSE	TRUE		A-03103021-A0005	713688
A0005	ACME STORE 0005	1	DEMO DRESS 05	A-03103021	5	3	1,6414	1,3586	3,059	12	15	0	DRESSES	0	11/09/2016	FALSE	TRUE		A-03103021-A0005	713709
A0005	ACME STORE 0005	1	DEMO DRESS 05	A-03103021	6	8	1,2237	6,7763	2,2806	3	11	0	DRESSES	0	11/09/2016	FALSE	TRUE		A-03103021-A0005	713731
A0006	ACME STORE 0006	1	DEMO DRESS 05	A-03103021	4	1	0,6645	0,3355	1,1814	9	10	12	DRESSES	0	11/09/2016	FALSE	TRUE		A-03103021-A0006	713689
A0006	ACME STORE 0006	1	DEMO DRESS 05	A-03103021	5	7	1,2351	5,7649	2,1957	6	13	0	DRESSES	0	11/09/2016	FALSE	TRUE		A-03103021-A0006	713711
A0006	ACME STORE 0006	1	DEMO DRESS 05	A-03103021	6	3	1,3922	1,6078	2,4751	9	12	0	DRESSES	0	11/09/2016	FALSE	TRUE		A-03103021-A0006	713733
A0010	ACME STORE 0010	1	DEMO DRESS 05	A-03103021	5	2	1,1263	0,8737	2,5257	11	13	0	DRESSES	0	11/09/2016	FALSE	TRUE		A-03103021-A0010	713714
A0010	ACME STORE 0010	1	DEMO DRESS 05	A-03103021	6	4	0,804	3,196	1,8029	6	10	0	DRESSES	0	11/09/2016	FALSE	TRUE		A-03103021-A0010	713737

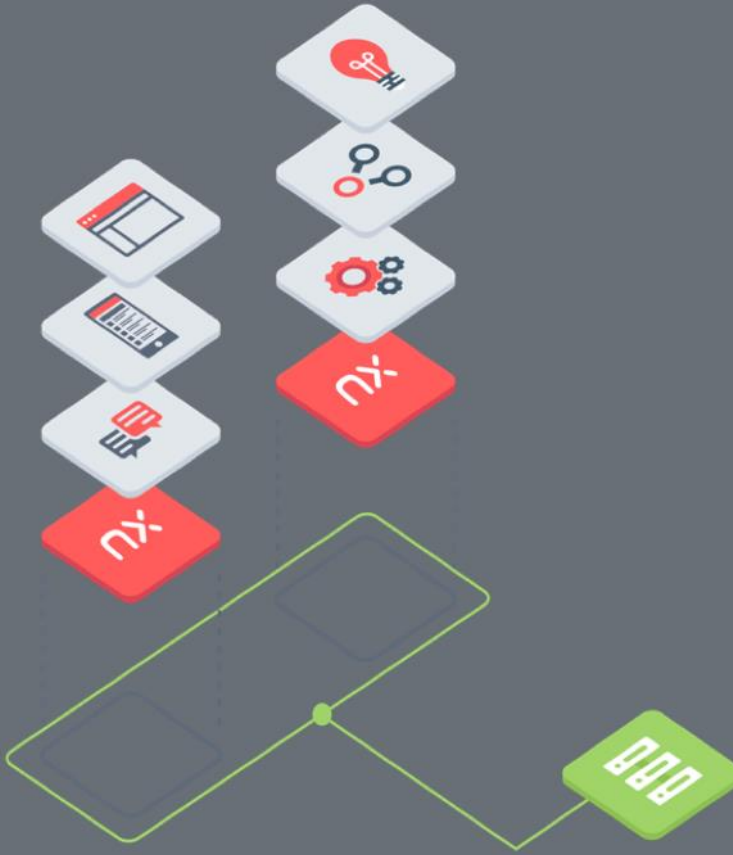
The Waybill is a machine-readable file which is integrated with your Warehouse Management System

b Download WAYBILLS FILE

```
"createddate": "03/05/2019",  
"filetype": "early",  
"replenlines": [  
  {  
    "sku": "5444547",  
    "store": 1,  
    "quantity": 1  
  },  
  {  
    "sku": "5530201",  
    "store": 1,  
    "quantity": 1  
  },  
  {  
    "sku": "5603813",  
    "store": 163,  
    "quantity": 1  
  },  
  {  
    "sku": "5603813",  
    "store": 187,  
    "quantity": 1  
  },  
]
```

Waybills will be sent into ODBMS where transfers will be created and then sent to the warehouse as they are currently.

The format of the waybills has been defined by your technical team & warehouse operations team

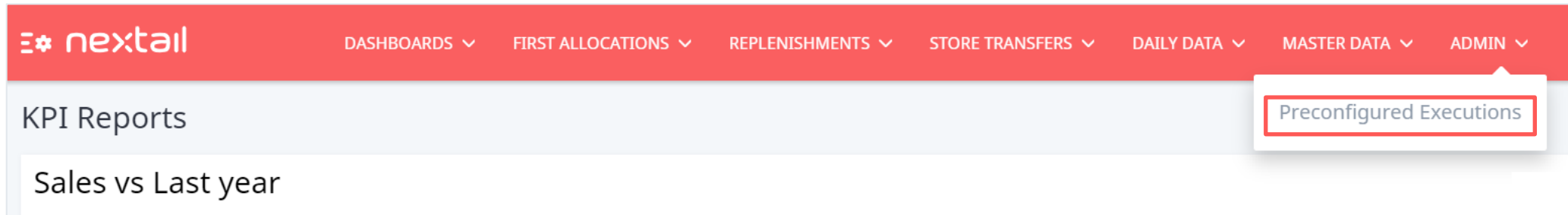


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Edit or configure an “automatic replenishment execution” in the Nextail process

1| Go to Admin > Preconfigured executions



2| On this screen you will see the list of all preconfigured, active or inactive executions in the system



a) In the upper right corner, on the “New execution” option, you will be able to create another automatic replenishment that will be processed the day before at night.

b) To start editing any of the existing executions, select one by clicking on the name.

Configure the parameters once you have selected or created an execution

Parameter input for Boutiques SS20

GENERAL PARAMETERS

Execution Name: Boutiques SS20
Position: 1

Enabled
 Send E-mail

EXECUTION PARAMETERS

Brand: Own Stores
Warehouse: RETAIL
Master section: Any
Season: Any

Calendar Plan: Default Plan
Days of execution: monday, tuesday, v
Execution Type: Daily

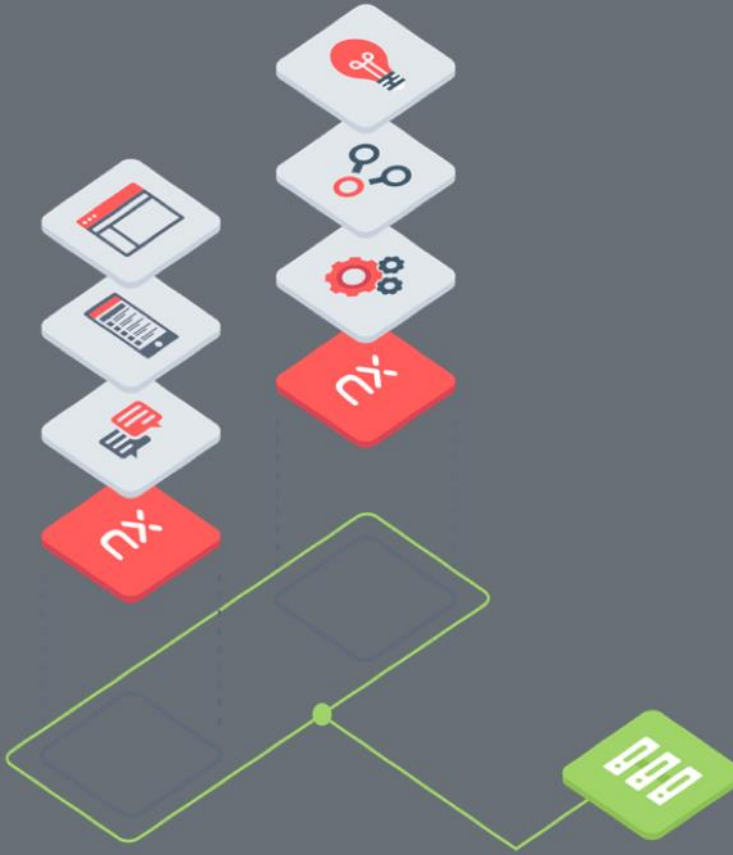
Product category:
Store category:

1| General parameters:

- **Execution Name:** descriptive name
- **Position:** order of priority when more than one preconfigured run is triggered. If not specified, it will use the order shown on the screen
- **Checkbox - Enabled:** to enable or disable temporarily an execution
- **Checkbox - Send email:** it sends a notification with a link to the scenario. The recipients were coordinated previously with the Nextail team

2| Execution parameters:

- **Days of execution:** pre-set which days of the week Nextail will launch this scenario
- **Execution type:** select daily to launch the scenario on the days you selected before








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As we reviewed in our last session, there are many criteria that you can influence within a Nextail replenishment

Inputs you can influence for Demand Forecasting






-  Previous weeks sales
-  Weight of weeks
-  Planning horizon
-  Lead times & calendars
-  Promotions

Inputs you can influence in the Global Optimisation







-  Sales product threshold
-  Visual rules
-  Minimum displays
-  Blocks
-  Recently introduced products
-  Other conditions

There are several ways to upload your input within the platform

Inputs you can influence for Demand Forecasting

-  Previous weeks sales
-  Weight of weeks
-  Planning horizon
-  Lead times & calendars
-  Promotions

Inputs you can influence in the Global Optimisation

-  Sales product threshold
-  Visual rules
-  Minimum displays
-  Blocks
-  Recently introduced products
-  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
	Previous weeks sales	✓		
	Weight of weeks	✓		
	Planning horizon	✓		
	Lead times & 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	✓	✓	
	Blocks	✓	✓	
	Recently introduced prod			✓
	Other conditions			✓

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
- Blocks

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

1 | Previous week sales - Number of previous weeks used for the forecast

Parameter input

FORECAST PARAMETERS

1

Seasonal coefficient	Planning horizon	Forecast weeks
<input type="text" value="1.0"/>	<input type="text" value="10"/>	<input type="text" value="3"/>

Planning horizon by store Same weight for all weeks

Week 1	Week 2	Week 3
<input type="text" value="20"/>	<input type="text" value="30"/>	<input type="text" value="50"/>

[Calculate →](#)

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

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

Parameter input

FORECAST PARAMETERS

Seasonal coefficient	Planning horizon	Forecast weeks
<input type="text" value="1.0"/>	<input type="text" value="10"/>	<input type="text" value="3"/>

Planning horizon by store Same weight for all weeks

2

Week 1	Week 2	Week 3
<input type="text" value="20"/>	<input type="text" value="30"/>	<input type="text" value="50"/>

[Calculate →](#)

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

3 | Planning horizon - Number of future sales days to be covered with forecast calculation after lead time (days we want to replenish)

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

Parameter input

FORECAST PARAMETERS

3

Seasonal coefficient: 1.0

Planning horizon: 10

Forecast weeks: 3

Planning horizon by store

Same weight for all weeks

Week 1: 20

Week 2: 30

Week 3: 50

Calculate →

We have a functionality called "Planning horizon by store" where the algorithm will replenish only up to the following

Directly in the platform

Demand Forecasting:

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

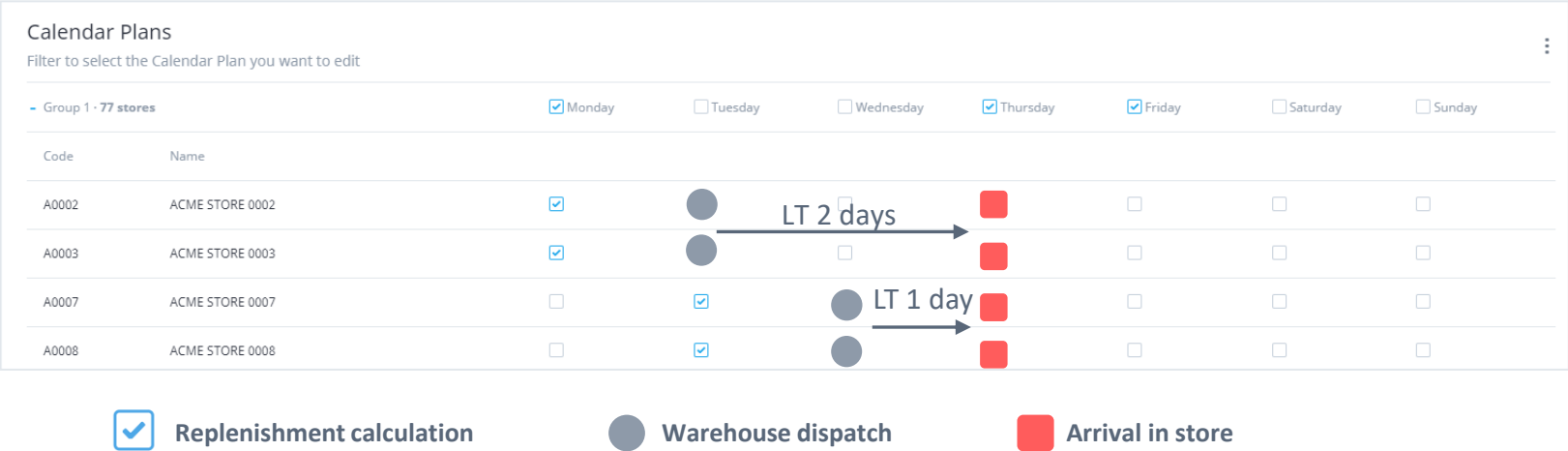
Global Optimisations:

- Sales Thresholds
- Visual rules
- Minimum Displays
- Blocks

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

- 1| **Calendars** - It guarantees the stores receive the stock that they deserve calculating the need daily even if there is no warehouse order
- 2| **Lead times**- Automatically taken into account when managing calendars

Calendars are configured in Nexttail and they will be taken into account during the replenishment calculation.



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
- Blocks

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>Black Friday 2018 - Stores A </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>Black Friday 2018 - Stores 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>Mid Season Sales </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>Flash Sales Week 48 </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>Summer Sales - Stores A </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>Web Summer Special </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

We recommend to use a descriptive name for the promotion so you can easily identify it

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

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
- Blocks

The sales threshold can be modified from the “Master Data” menu

- 1| Go to menu “Master Data > Products”
- 2| Select the references you would like to change the sales threshold for and click on “Change Sales Threshold Selected”
- 3| Introduce the new % of sales threshold and click “Save changes”

We recommend to use this process only when you need to modify a small number of products

The screenshot shows the Nextail platform interface. On the left, a sidebar menu under 'MASTER DATA' has 'Products' highlighted with a red box and a red '1'. The main content area shows the 'Products' page with a table of three products. Each product row has a checkbox in the first column, which is checked for all three. A red '2' points to a green 'CHANGE SALES THRESHOLD' button in the top right. A dialog box titled 'New Sales Threshold' is open, showing '3 product(s) selected' and a text input field containing '0' with a red '3' pointing to it.

Product	Full price	Current price	Sales threshold	Family	Season
<input checked="" type="checkbox"/> ACME PRODUCT 03945 100013	15.99	15.99	0%	PASMINAS Y PAÑUELOS	OI12
<input checked="" type="checkbox"/> ACME PRODUCT 03946 100015	15.99	15.99	0%	PASMINAS Y PAÑUELOS	OI12
<input checked="" type="checkbox"/> ACME PRODUCT 03947 100016	15.99	15.99	0%	PASMINAS Y PAÑUELOS	OI12

This is one of the parameters that you will use the most to influence replenishment

Directly in the platform

Demand Forecasting:

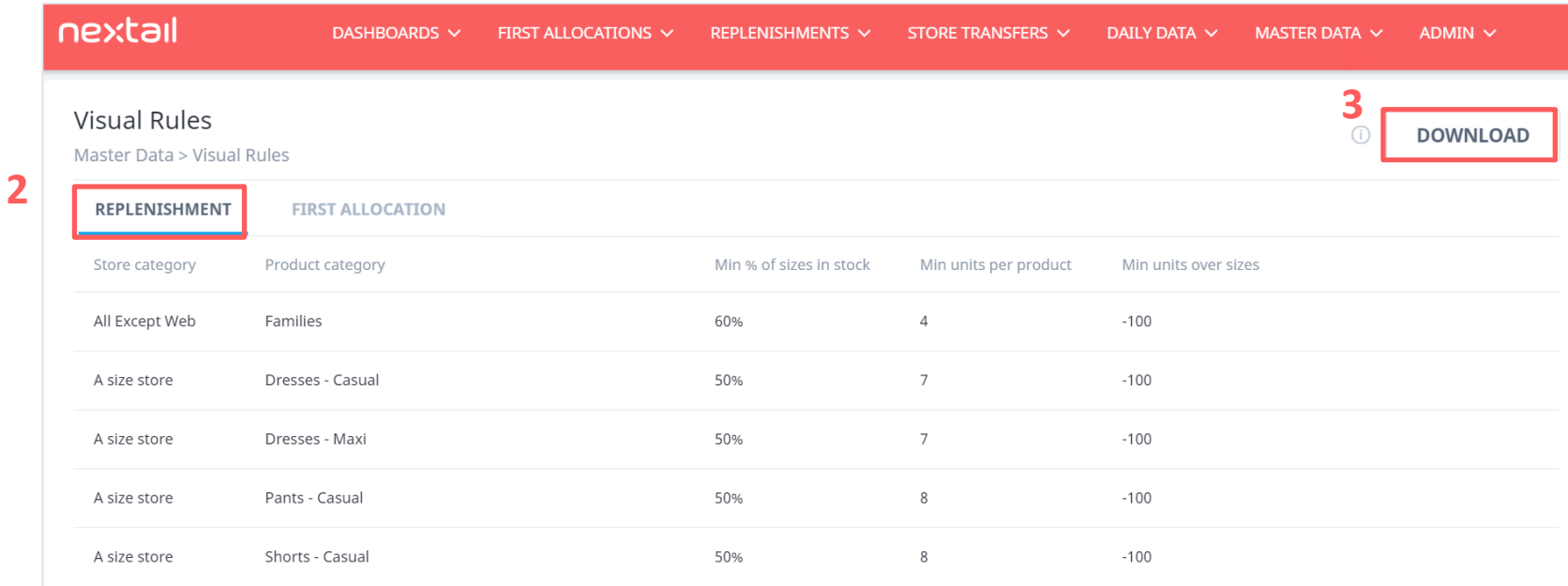
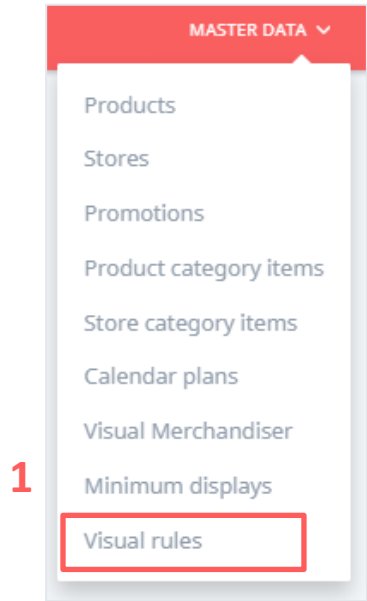
- Previous weeks sales & weights of each week
- Planning Horizons
- Lead times & Calendars
- Promotions

Global Optimisations:

- Sales Thresholds
- **Visual rules**
- Minimum Displays
- Blocks

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

- 1| Go to Master Data -> Visual rules
- 2| Select the Replenishment 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:

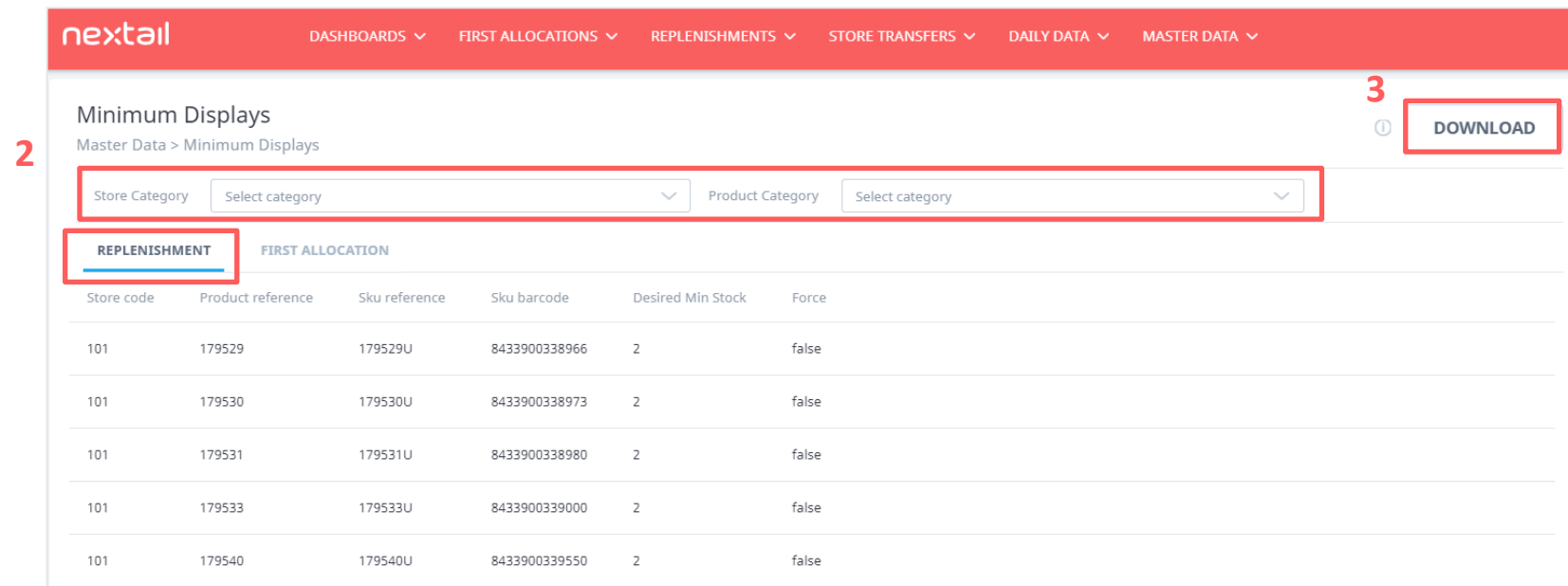
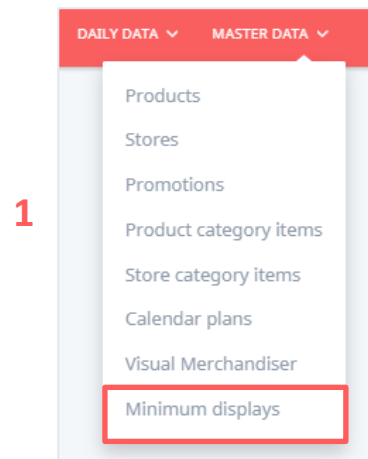
- Previous weeks sales & weights of each week
- Planning Horizons
- Lead times & Calendars
- Promotions

Global Optimisations:

- Sales Thresholds
- Visual rules
- **Minimum Displays**
- Blocks

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

- 1| Go to Master Data -> Minimum Displays, select Replenishment 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



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
- **Blocks**

Blocking/ unblocking products can be directly modified for specific product-stores cases under “Visual Merchandiser”

- 1| Go to the menu “Master Data > Visual Merchandiser”
- 2| Tick the products you want to block from being sent to a given store (or the opposite)
- 3| Save changes pushing the “Block” button (or unblock)

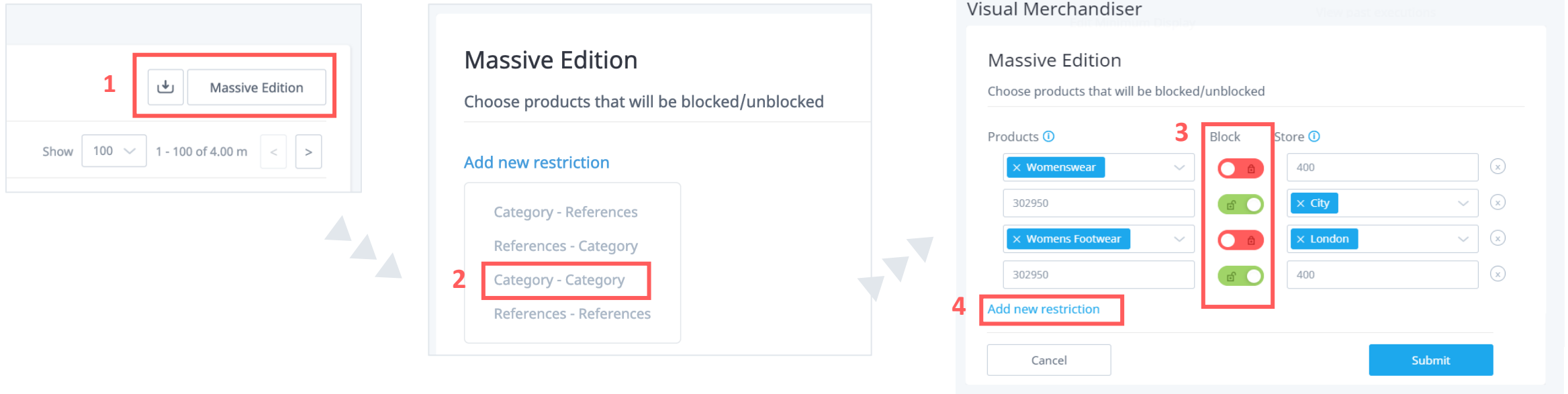
The screenshot shows the Nextail Visual Merchandiser interface. On the left, a navigation menu under 'MASTER DATA' has 'Visual Merchandiser' highlighted with a red box and labeled '1'. The main content area is titled 'Visual Merchandiser' and 'Blockages' (1,012 Products). At the top right of the blockages section are buttons for 'Block' and 'Unblock', both highlighted with a red box and labeled '3'. Below these buttons is a table with columns: STATUS, PRODUCTS, FAMILY, STORE, STOCK COMMERCIAL, and FIRST AVAILABLE DATE. The table contains three rows for product A-02503021 at different stores. The first row has a green dot in the status column. The second row has a checked checkbox in the status column, a green dot, and is highlighted with a dashed box and labeled '2'. The third row has a red dot in the status column. A legend at the bottom explains: a green dot means the product is not blocked for that store, and a red dot means it is already blocked.

STATUS	PRODUCTS	FAMILY	STORE	STOCK COMMERCIAL	FIRST AVAILABLE DATE
<input type="checkbox"/>	A-02503021	DRESSES	A0001 - ACME STORE 0001	1	17 Dec 2016
<input checked="" type="checkbox"/>	A-02503021	DRESSES	A0002 - ACME STORE 0002	3	22 Dec 2016
<input type="checkbox"/>	A-02503021	DRESSES	A0003 - ACME STORE 0003	0	31 Dec 2016

● Green dot means that product is not blocked for that store
● and red that it is already blocked

You also have the ability to globally set blocks/ unblocks for product-store categorizations through group restrictions (“Massive Edition”)

- 1| Push “Massive Edition” button
- 2| Select the option that fulfils the restriction, i.e.: block a specific product category and even within a certain store category (categories already created ^(*))
- 3| Once the desired group of products and/or stores have been selected, select block/unblock option.
- 4| You can also add new restrictions afterwards.



^(*) The client can request the support of their Account Manager if needed

The status of a current product in a store can be checked in the Visual Merchandiser screen

The screenshot shows the Nextail Visual Merchandiser interface. On the left is a dark sidebar with filter options. The main content area has a red header with the Nextail logo and navigation menus. Below the header is the 'Visual Merchandiser' section, which includes a 'Blockages' table. The table lists products that are blocked in various stores, with columns for status, product ID, family, store name, stock, and first available date.

Visual Merchandiser

Blockages
432,336 Products

Buttons: Block, Unblock, Show 100, 1 - 100 of 432,336, Massive Edition

<input type="checkbox"/>	STATUS	PRODUCTS	FAMILY	STORE	STOCK COMMERCIAL	FIRST AVAILABLE DATE
<input type="checkbox"/>	●	179980	Dresses and All in 1s	924 - ACME STORE 001	0	
<input type="checkbox"/>	●	179980	Dresses and All in 1s	916 - ACME STORE 002	0	
<input type="checkbox"/>	●	179980	Dresses and All in 1s	917 - ACME STORE 003	0	12 Feb
<input type="checkbox"/>	●	179980	Dresses and All in 1s	935 - ACME STORE 004	0	
<input type="checkbox"/>	●	179980	Dresses and All in 1s	912 - ACME STORE 005	0	12 Feb
<input type="checkbox"/>	●	179980	Dresses and All in 1s	915 - ACME STORE 006	0	

Once we have filtered the data by some criteria, you have the option to download the results to run additional checks

The screenshot shows the 'Visual Merchandiser' interface for 'Blockages'. The title is 'Blockages' with a subtitle '432,336 Products'. There are 'Block' and 'Unblock' buttons. A 'Show 100' dropdown and '1 - 100 of 432,336' pagination are visible. A table lists products with columns: STATUS, PRODUCTS, FAMILY, STORE, STOCK COMMERCIAL, and FIRST AVAILABLE DATE. A download icon (a square with a downward arrow) is highlighted with a red box, and a 'Massive Edition' button is next to it.

	A	B	C	D	E
1	Product	Status	Family	Store	Stock Commercial
2	179980	Blocked	Dresses and	924- ACME S	0
3	179980	Blocked	Dresses and	916- ACME S	0
4	179980	Available	Dresses and	917- ACME S	0
5	179980	Available	Dresses and	935- ACME S	0
6	179980	Available	Dresses and	912- ACME S	0
7	179980	Blocked	Dresses and	915- ACME S	0

Data Uploads

Demand Forecasting:

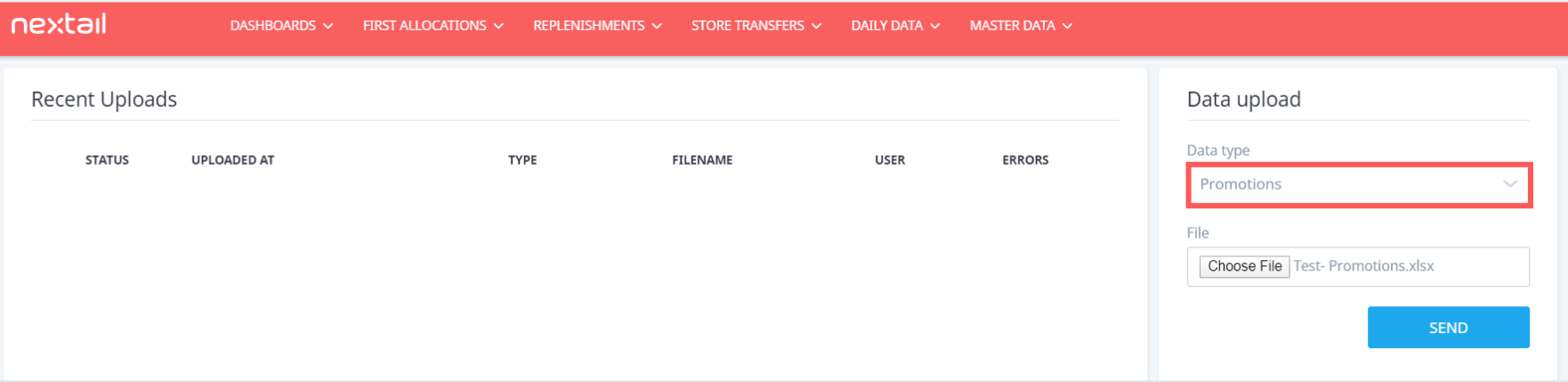
- **Promotions**

Global Optimisations:

- Sales Thresholds
- Visual rules
- Blocks
- 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:

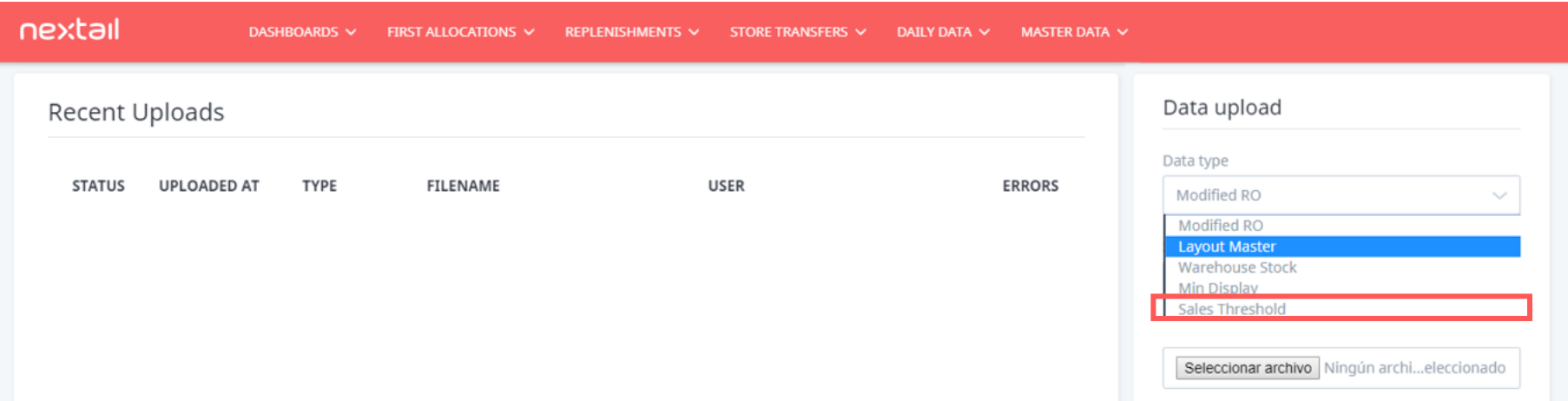
- Promotions

Global Optimisations:

- **Sales Thresholds**
- Visual rules
- Blocks
- Minimum displays

You have the opportunity to upload data files for Sales Threshold

1| Go to "Data Upload > Select "Sales Threshold" inside the Data type:



2| The file to upload should contain 2 columns:

	A	B
1	ProdReference	Sales_Threshold
2	187826	30%
3	187841	30%
4	188124	30%
5	187466	30%

- **ProdReference:** fulfilled with the reference of the products
- **Sales_Threshold:** the value we want to use as sales threshold for the correspondent product.
 - Note: the value must be a percentage, e.g.: 30% or a decimal point, e.g.: 0.3 in this case

Data Uploads

Demand Forecasting:

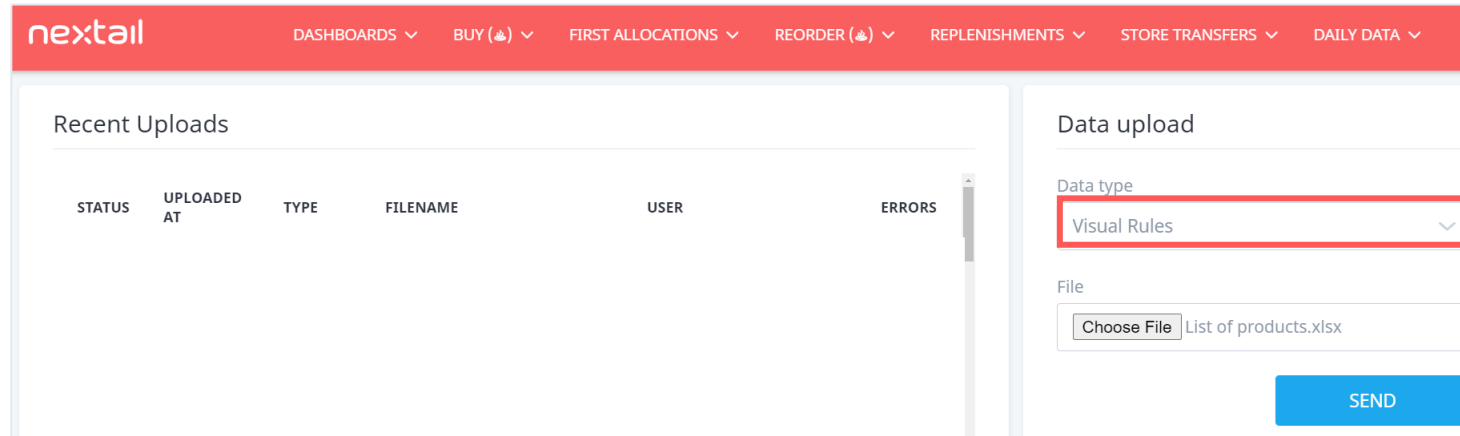
- Promotions

Global Optimisations:

- Sales Thresholds
- **Visual rules**
- Blocks
- 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” 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	MinSizesPercentageInStock	MinUnitsPerProduct	UnitsOverSizeNumber
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:** minimum percentage of the size curve to display in the store
- **Min units per product:** minimum number of units to display in the store
- **Units over size number:** additional units over the size count. Value used for the calculation of min. units per product

Data Uploads

Demand Forecasting:

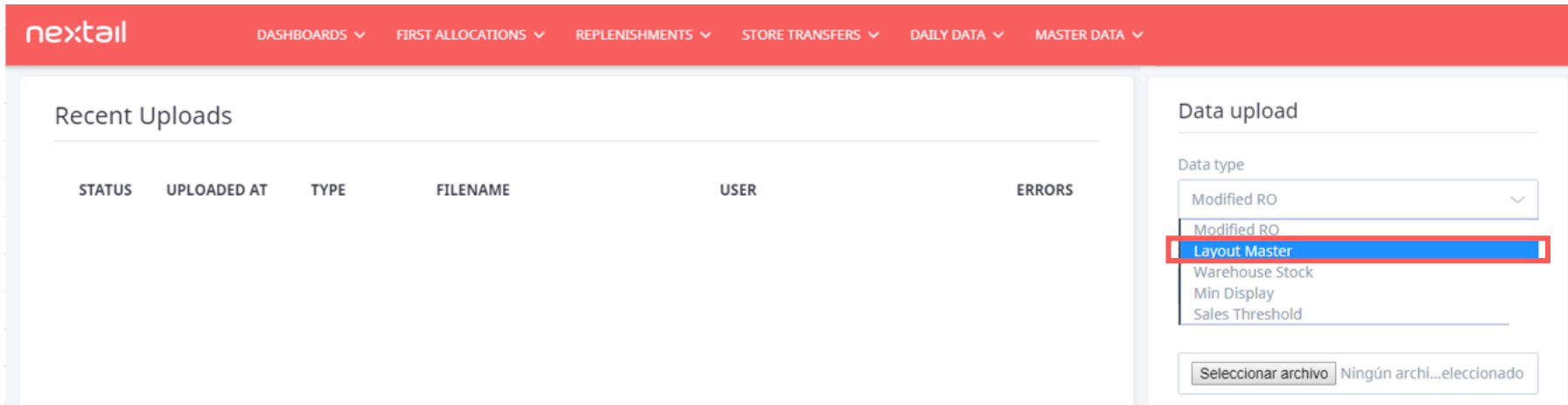
- Promotions

Global Optimisations:

- Sales Thresholds
- Visual rules
- **Blocks**
- Minimum displays

You have the ability to upload product-stores status (blocks and unblocks) through the Layout Master

1| Go to Daily Data > Data Upload, select the option “Layout Master” and choose the file to be uploaded:



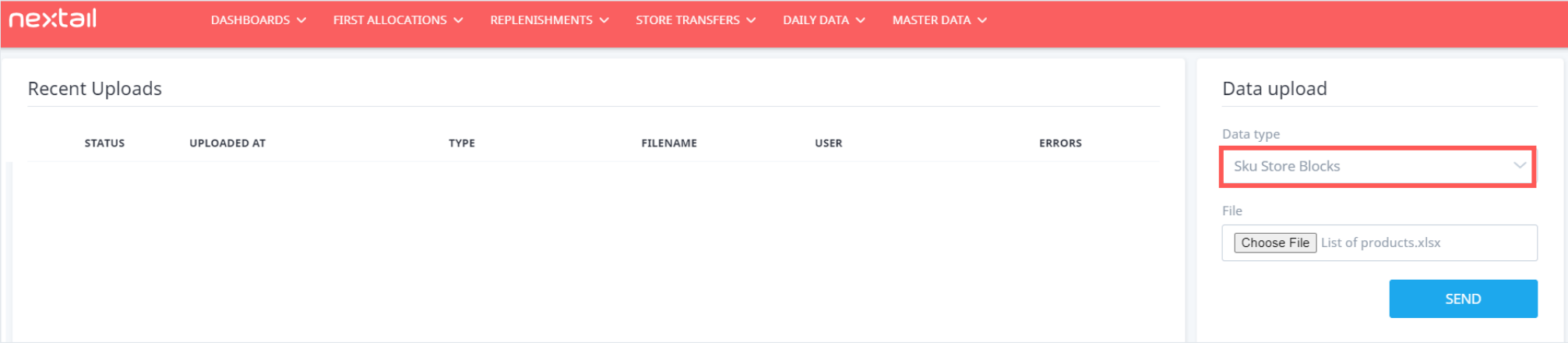
2| The file must contain 4 columns named exactly as in the picture below so each line allows you to refer to a product-store combination.

A	B	C	D
ProductRef	StoreCode	Replenishme	Replenishment_FA
187289	947	0	0
187290	947	0	0
187291	947	0	0
187289	615	0	0
187290	615	0	0
187291	615	0	0
187293	615	0	0

- **ProductRef:** This is the product reference.
- **StoreCode:** The code store.
- **Replenishment:** Should contain:
 - “1” if we want to restore /allocate
 - “0” if we want to block
- **Replenishment_FA:** N/A for replenishment module (only for first allocation)

Applying blocks at a product-store level is no longer sufficient in certain cases. Block per size will help you to refine the assortment

1| Access to Daily data > Data upload, select the SKU-Store blocks option and upload an excel or csv file to be processed.



2| The system will accept files with 3 columns named exactly as “SkuRef”, “StoreCode” and “Replenishment”. For each row has to contain the combination of SKU-store you want to block them in the Replenishment.

	A	B	C
1	SkuRef	StoreCode	Replenishment
2	Misc76094	1	0
3	SS2076480	1	0
4	SS2076480	1	0
5	SS2076360	1	0
6	SS2079704	1	0
7	SS2076360	1	0
8	SS2076480	1	0
9	SS2079704	1	0

- **SkuRef:** The SKU reference (e.g. “123456_XS”) or barcode
- **StoreCode:** The code store
- **Replenishment:** Should contain:
 - “1”: if we want to replenish
 - “0”: if we want to block

Data Uploads

Demand Forecasting:

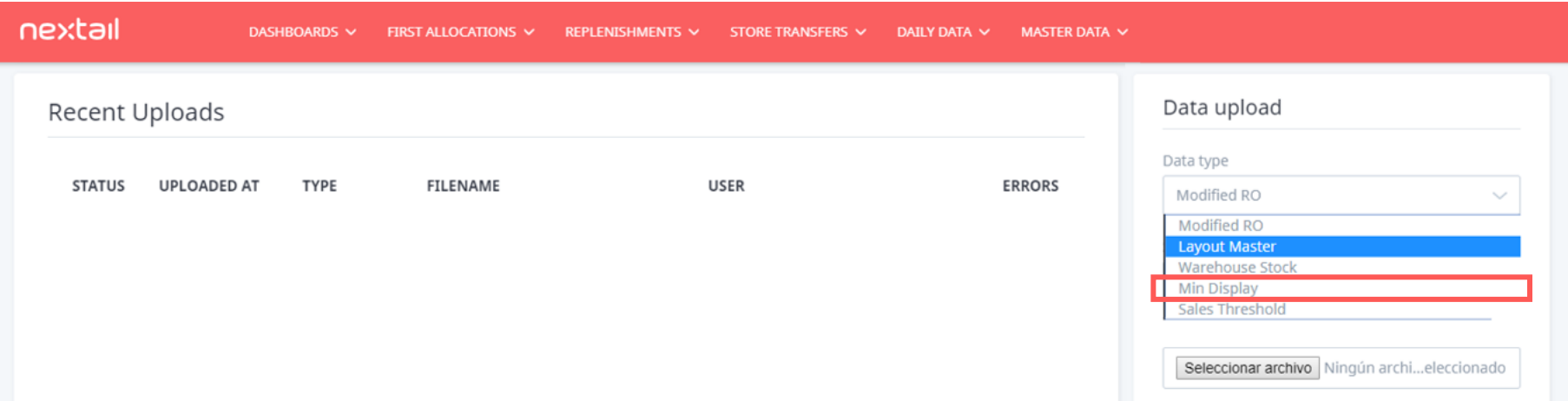
- Promotions

Global Optimisations:

- Sales Thresholds
- Visual rules
- Blocks
- **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 navigation bar at the top containing: nextail, DASHBOARDS, FIRST ALLOCATIONS, REPLENISHMENTS, STORE TRANSFERS, DAILY DATA, and MASTER DATA. The main content area is split into two sections:

Recent Uploads

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

Data type

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

Seleccionar archivo Ningún archi...eleccionado

- 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.

For linked lines products you must always use the active reference (newest one)

1| You can check the switch history going to Master Data – Products , filtering for the product reference and clicking in the product card.

2| Use active reference for changes in:

- Sales Thresholds
- Blocks
- Minimum displays
- Promotions

Switch history		
REFERENCE	NAME	ACTIVE
737443	JERSEY PUNTO	Yes
733681	JERSEY PUNTO	
736292	JERSEY PUNTO	
737439	JERSEY PUNTO	
736628	JERSEY PUNTO	
734082	JERSEY PUNTO	
733671	JERSEY PUNTO	
735442	JERSEY PUNTO	

Through your Nextail Services team

Demand Forecast:

- Lead Times

Global Optimisations:

- Recently introduced products
- Other conditions

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

Current Values

Change request

Store lead times:

Defined in the Store Master

Request change in the Store Master

Recently introduced products:

NA

Champions will email Nextail services team

Other conditions:

- Max Stock by Store
- Max Stock by Store-Product Category
- Min/Max Replenishment qty

NA

Received in the Store Master






NA







Via email to Nextail Services team

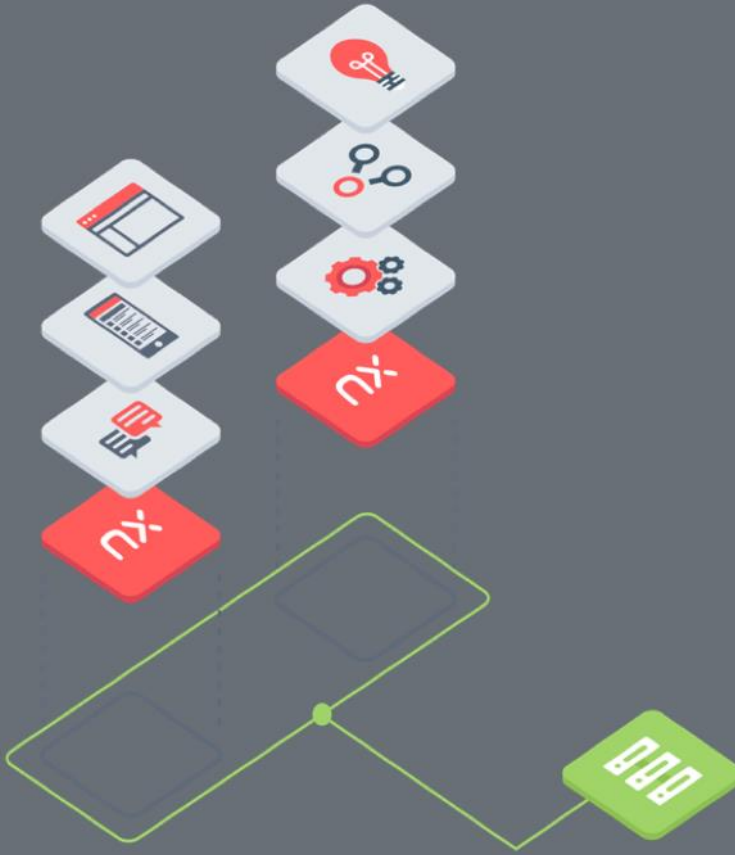
NA

Received in the Store Master

We have now reviewed all criteria which you can influence

Inputs you can influence for Demand Forecasting		Directly within the platform	Data uploads	Through your Services team
	Previous weeks sales	✓		
	Weight of weeks	✓		
	Planning horizon	✓		
	Lead times & 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		✓	
	Blocks	✓	✓	
	Recently introduced prod			✓
	Other conditions			✓



Content

- 1 Category Management
- 2 Replenishment Optimisations
- 3 Inputting data into the platform
- 4 **Next steps**



As a reminder, we said that at the end of this session we would expect you to do the following...

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



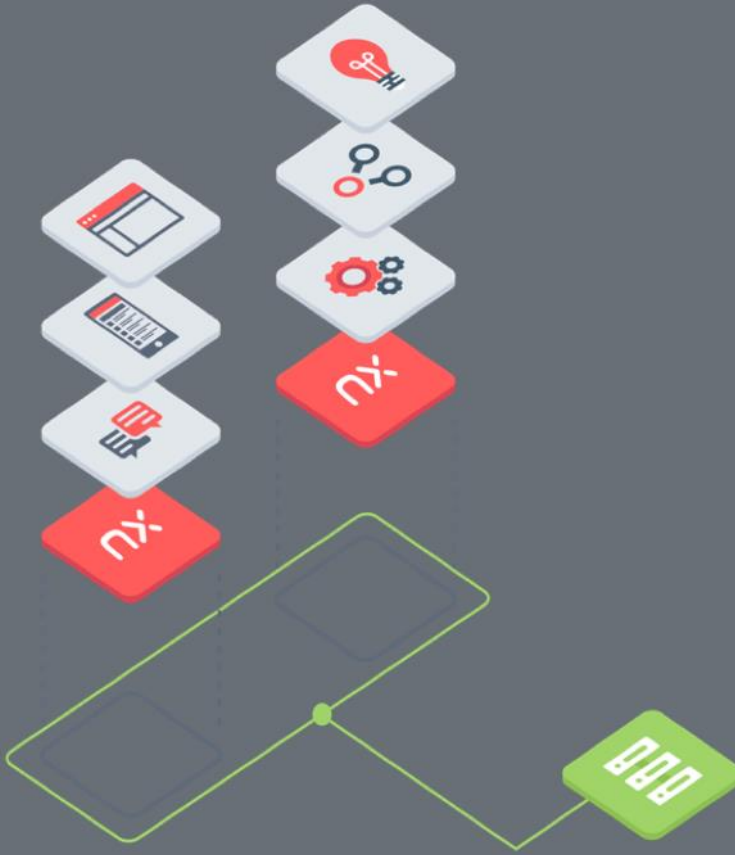
Did we achieve our goals?

- ⓪ Be able to run a Replenishment optimisation
- ⓪ Review & download results of a Replenishment optimisation
- ⓪ Feel comfortable inputting some criteria directly within the platform
- ⓪ Feel comfortable uploading criteria into the platform through data files
- ⓪ Understand how Nextail uses categories to give flexibility on data management by stores & products

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Appendix





Appendix

- 1 **A detailed view into a Replenishment Order file (RO file)**
- 2 A detailed view into Promotions

The RO file: Fields in detail 1 of 2

1. **Store Code:** Store's code
2. **Store Name:** Store's name
3. **Store Group:** Store's group according to the replenishment calendar
4. **Lead Time:** Period of time taken by the product between the arrival of the order in the warehouse (picking, truck etc.) and its arrival to the store
5. **Prod Name:** Product name
6. **Prod Reference:** Product's reference code
7. **Size:** Size
8. **Store Stock:** Commercial stock + stock in transit at that particular moment
9. **Stock Forecast:** Estimated demand of a particular product while the replenishment arrives.
10. **Stock Projection:** Estimated stock of a particular product that you right before the arrival of the replenishment.
11. **Demand Forecast:** Projected sales estimation
12. **Quantity:** Units of a particular sku sent to a store
13. **Total:** Total units that will be sent at the store (current stock+ transit+ sent units)
14. **Pack:** Number of units per pack
15. **Min.display:** Number of units set as a minimum display
16. **Total Sent:** Total number of units of the sku sent to all the stores
17. **WH stock (After Repl.):** Stock units that remain in the warehouse after the replenishment process
18. **Family:** Family of the product

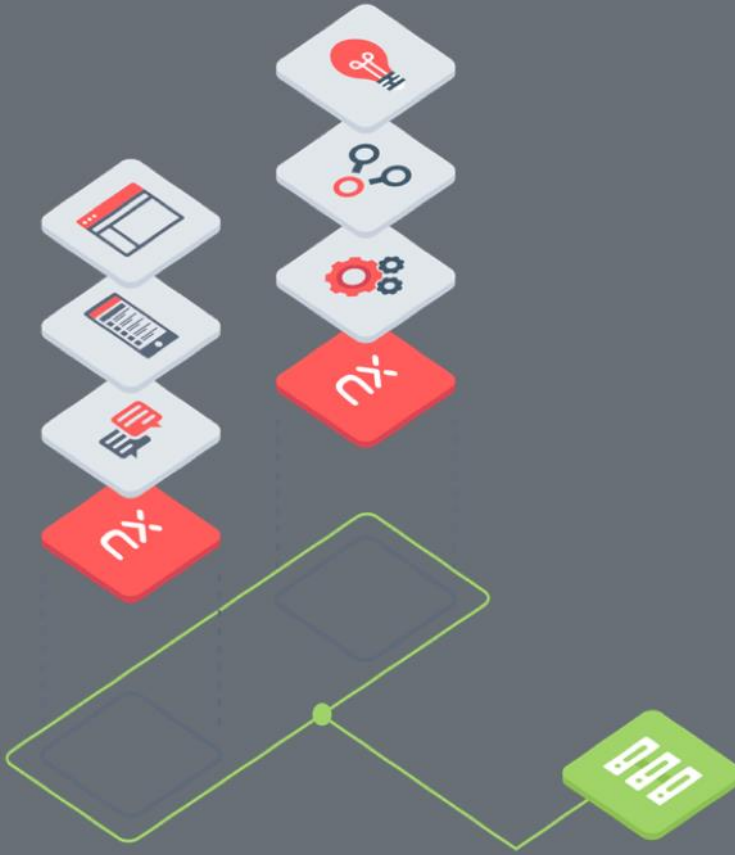
(*) For activating "Optional" fields the client needs to contact Nextail's team. Please note that the larger the number of columns in the file, the longer it will take to create the file

The RO file: Fields in detail 2 of 2

- 19. **Agr %:** Established probabilistic threshold at product level. The lower it is, the higher the probability of sale
- 20. **Available Date:** Date of the first sale or first day of availability at the store
- 21. **Waybills:** Shipping order for the WH:
 - If true: The Product is sent on the same day to the WH
 - If false: The product is sent another day, established on the calendar
- 22. **Wh Stock:** units left in the warehouse before running a replenishment execution
- 23. **Quantity 7:** Sku units sold in a particular store for the last 7 days (*)
- 24. **Quantity 28:** Sku units sold in a particular store for the last 28 days (*)
- 25. **Transit Stock:** Stock that is travelling from WH to store (*)
- 26. **Section:** Womenswear, Menswear, Kidswear, Home
- 27. **Season:** Season of which the product is part
- 28. **Store request:** only available through the app mobile. NA in RI
- 29. **Product- Store:** Product-Store combination. A very useful field to deep dive on replenishment
- 30. **Id:** Internal identification number for every sku-product on that RO
- 31. **Total quantity 28:** Sku units sold at all stores in the last 28 days (*)
- 32. **Order type:** Flag that indicates whether we are sending single units, prepacks or both (*)



(*) For activating "Optional" fields the client needs to contact Nextail's team. Please note that the larger the number of columns in the file, the longer it will take to create the file



Appendix

- 1 A detailed view into a Replenishment Order file (RO file)
- 2 **A detailed view into Promotions**

Promotions: Fields in detail

1. **Name:** Specific name we want to use to store the promotion's data
2. **Stores Category:** Selection of stores impacted by the promotion
3. **Product Category:** Selection of products impacted by the promotion
4. **Period:** Start and end date for the promotion in the stores
5. **Similar Promotion:** List of past promotions stored of which we can select the one most similar to the upcoming one.
6. **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.
7. **Promotion features:** Description of the promotion.