LECTRA FASHION PLM

Collection Planning

Process Manual

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INTRODUCTION

Collection Planning allows the user to:

- Define a hierarchical collection structure where budget objectives, quantities of products/colors and market positioning are allocated.
- Define products/colors to develop or carry over their main cost data, development processes, deadlines, sizes, material, style, etc. (Range plan). The products/colors defined are generated in the product development module where they are developed.
- Carry out a compilation and balance of the budgets across a collection structure.
- Compare the data from a budget plan, range plan and development.

CONVENTIONS

PLM	=	Product Lifecycle Management Solution
Product development module	=	Product Developer
Collection planning module	=	Collection Planner
Calendar scheduling module	=	Calendar Manager
Administration and configuration management software	=	PLM Manager

COLLECTION PLANNING OBJECTIVES

Collection plan

The objectives of the new collection are defined in volume (number of styles and breakdowns (styles/colors), quantity to produce...) on different levels of the hierarchical structure. The objectives can also be defined in financial terms (turnover, price, cost, margins...) which is the budget plan.

Range Plan

At this level (the collection plan's deepest), the products do not yet exist but it is here that they are planned and their quantitative and qualitative characteristics defined for deployment in Product Developer.

Data Consolidation

Data from the collection plan, range plan and products are consolidated as modifications are made. The aim of such consolidation is to provide a comparative display of three levels of data:

- The collection plan data, values initially projected and reviewed during the development of the season, especially for sales functions for previous seasons.
- The range plan data, generally defined from a collection plan and in possible evolution according to the budgetary objectives, development constraints and design contributions.
- The products developed that are related to the range plan.

TASK LIST

- Definition of the collection structure
- Definition of the number of products and number of products/colors on all levels of the collection structure.
  Definition of the budgetary objectives and provisional sales volumes
- Creation of projects/breakdowns in the range plan as projected in the collection plan or from design propositions (consolidation of the collection plan from the design creation).
- Monitor turnover, cost, price, margins at all levels
- Deployment of styles/colors in development from the range plan
- Monitor the collection's evolution as developments and adjustments are subsequently made
- If necessary, budget modification, provisional quantities, the number of products or slot breakdowns

POSSIBLE TASK ALLOCATION BASED ON THE DIFFERENT PARTICIPANTS

Collection manager

- Creates the collection structure
- Breaks down objectives in the collection structure
- Compares consolidated data (objectives/actual/attained) and adjusts the plans accordingly

Designer

- Consults the range plan
- Creates new styles
- Initiates style specifications (colors, material, image...) in a range plan
- Makes style propositions

Merchandizer

- Receives the proposals from the Designer
- Identifies the slot breakdowns and slots qualitatively (color, material, range plan, etc.) and quantitatively (cost, price, margins, etc.) and associates them with styles (style proposals received from the designers, existing styles to be carried over or modified)

Administrator

- Defines access rights for each user
- Creates hierarchies in PLM Manager

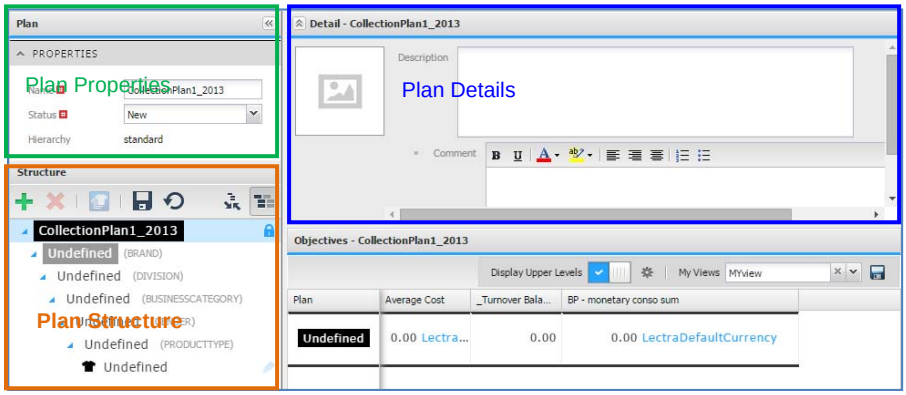
PLAN PREPARATION

1. DEFINING HIERARCHIES IN PLM MANAGER

Hierarchies must be defined based on the needs of each company.

To define these hierarchies, i.e., the ordered lists of criteria refer to **PLM Manager** online help.

2. DISPLAY AND NAVIGATION

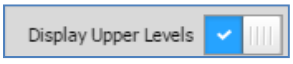


2.1 Collection plan

The **Plan** column indicates the different structure levels.

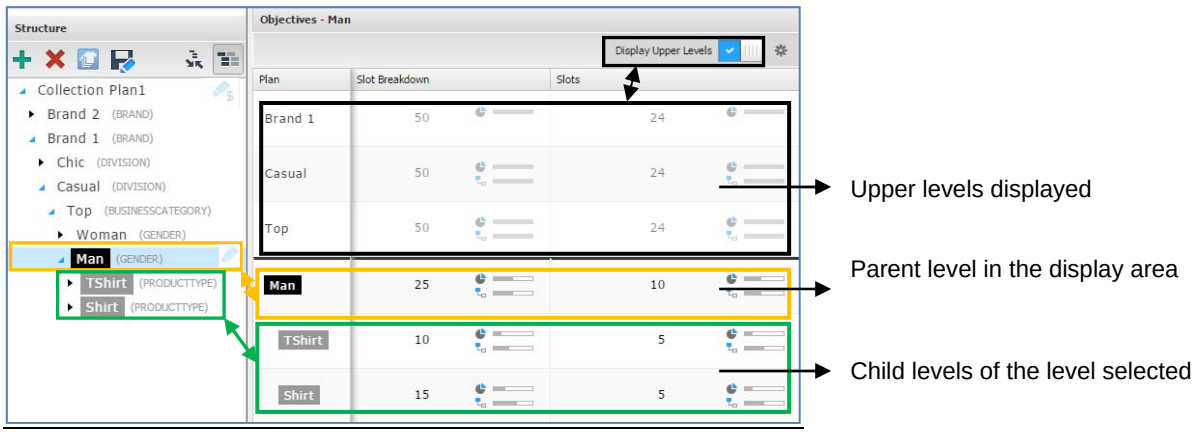
When you click on a level in this column, it becomes the parent level in the display area.

The child levels of a selected level appear below it.

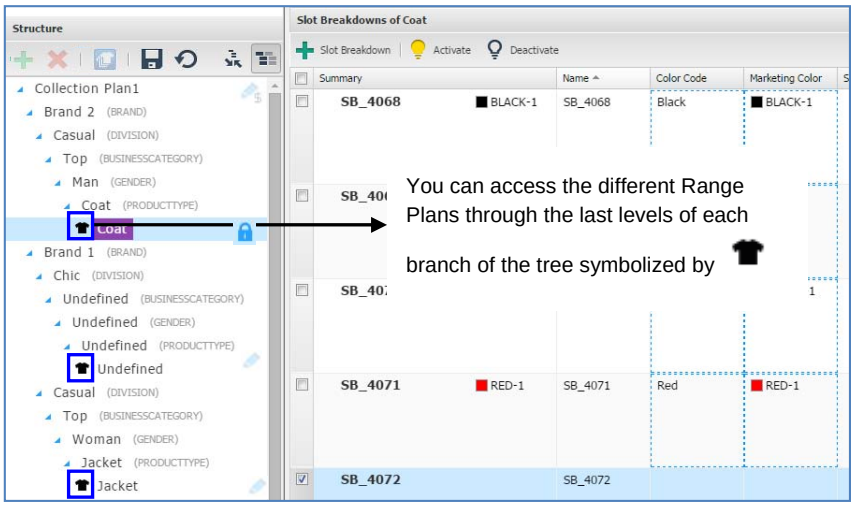
Activate/deactivate 

to display/hide the upper levels.

For example:



2.2 Range Plan



3. COLUMN ADJUSTMENT AND SAVING VIEWS

The tables of the Collection Planning set may have several columns. Based on their specific needs, users can customize them.

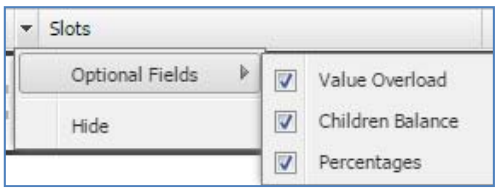
Please consult the user guide,**Lectra_Enterprise_Solutions_Platform-Common-features_User-Guide** for more details on **Column Adjustment** and **Saving Views**.

4. SHOW/HIDE CERTAIN VISUAL INDICATORS IN THE COLUMNS

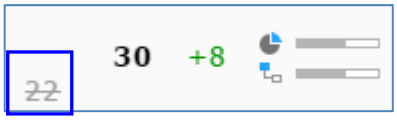
Some columns can display visual indicators that help with balancing. You can display them or hide them if you need more space.

1. Click on in the column heading and select **Optional Fields**.

2. Check/uncheck the options based on your needs.



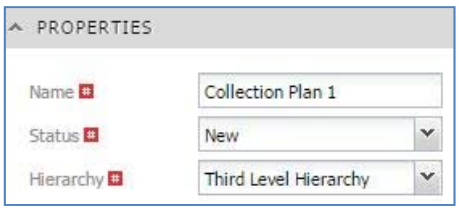
For example:

	Main data This value can be calculated based on lower levels or can be entered manually. Here, the value is entered (in **bold**)
	Reminder of the calculated value (appears when a value has been entered manually)
 	Positive or negative difference between main data and calculated value
	Indicates that the calculation is balanced
	Proportion of the main data's value in relation to the grand total (value appearing at the top of the hierarchy) Numerical values appear as a tooltip
	Proportion of the main data's value in relation to its immediate parent Numerical values appear as a tooltip

PLAN CONSTRUCTION

1. CREATING A BLANK PLAN

1. **Collections** > **Collection Plans**.
2. **Create**.
3. Define the **Plan Properties.**



- **Name**: the name should be unique
- **Status**: select a status from the list to assign to the plan
- **Hierarchy** (ordered list of classification criteria): Select a hierarchy from the list of hierarchies defined in PLM Manager. The hierarchy can include any of the classification criteria available in PLM Manager.
  Based on the hierarchy selected, a plan structure is proposed in the form of a tree with pre-filled "undefined" values for all hierarchy criteria.

To define the hierarchies, refer to **PLM Manager** online help.

4. Choose an **Image** to represent your collection plan by clicking on in the image
5. Add a simple **Description** and a more detailed **Comment** if you like.
6. Define Collection Plan Structure.
7. Click on:
   - to save changes
   - to discard changes and return to the collection plan list

2. CONSULT/EDIT/DUPLICATE AN EXISTING PLAN

2.1 Searching for a Collection Plan

1. **Collections** > **Collection Plans**.
2. Search the list for the name of the plan you want to display.

You can search by name by entering the letters contained in the name in the **Filter by name** field. The search results are refined as you enter letters.

2.2 Consulting the plan

1. Double-click the plan name.
   or
   Click on .

2.3 Editing the Plan

1. Click on next to the Collection Plan name in the structure.
   A lock is automatically assigned to the plan.

A collection plan can only be edited by one user at a time.

If a user continues editing longer than the maximum editing time allowed, an error message will appear and the screen will return to display mode and will be unlocked.

2. Edit the **Properties** and details of the plan as described in the previous chapter Creating a Blank Plan.
3. Define Collection Plan Structure.

2.4 Duplicating the plan with a new name (Save as)

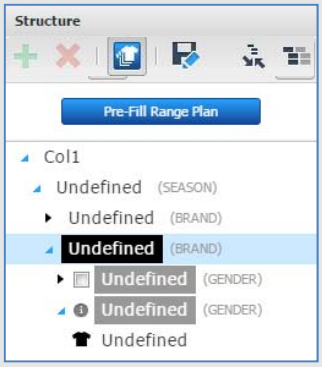
1. Click on .
2. Enter the new **Name** and confirm by clicking **OK**.
3. Edit the **Properties** and details of the plan as described in the previous chapter Creating a Blank Plan.
4. Define Collection Plan Structure.

Duplicating an existing plan is very useful when building a new season or sales period with an identical or very similar structure.
The collection structure is retained, as well as all general data (description, comments, status, image, etc.)

3. DEFINING THE COLLECTION PLAN STRUCTURE

Based on the **Hierarchy** selected, a plan structure is proposed. It proposes a root node named after the collection plan in addition to as many child nodes as are defined in the hierarchy.

Navigation within the structure and graphic indicators



Undefined (BRAND)	Node selected from the tree		Add a node
Undefined (BRAND)	Child node(s) selected		Delete a node
	This level provides access to range plan objectives		To select the nodes to be pre-filled in the range plan
	Indicates that the range plan has been pre-filled for this structure level		Duplicate the plan under a new name (Save as)
	Indicates that the pre-fill is not ready: values missing from the Budget Plan		Save the changes
			Discard the changes
			Show/Hide the names given in the hierarchy (here: Season/Brand/Gender)
			Expand/Collapse the structure for the node selected

3.1 Adding nodes

If needed, nodes can be added to different levels of the structure.

1. Place the cursor over an element of the tree and click on  to add a child to this element.

When you add a node, a set of children and sub-children are created with the value **Undefined**.

3.2 Naming the different nodes

1. Double-click on **Undefined**.
2. Select the desired value from the list offered.

The values are defined and can be configured in PLM Manager.

3.3 Moving nodes in the tree

1. Select the node to be moved then drag and drop it at the desired location.

Nodes can only be moved among sibling nodes (of the same level)

3.4 Deleting nodes

1. Select the node to be deleted and click on  .
2. Confirm the deletion with **Yes**.

You can only delete in editing mode.

Exceptions :

- The root node (collection plan name) cannot be deleted.
- A node cannot be deleted if it contains a range plan that contains data (slots or slot breakdowns). A warning message will appear when deletion is not possible.

DEFINING THE COLLECTION PLAN OBJECTIVES (INCLUDING THE BUDGET PLAN)

The collection objectives are defined in the budget plan at all structure levels. This is for:

- defining the collection's main lines in financial terms (turnover, cost, margins, etc.) and in volume (number of styles and slot breakdowns to develop, quantity to produce, etc.) which breaks down the budgetary allowance of a collection structure.
- comparing objectives with actual performance

The objectives can be entered or calculated at any level. You can enter them in either ascending or descending order.

The objectives for one level reflect the objectives of the upper levels, using cascading calculation parameters. The differences are highlighted and visual indicators make budget allocation easy by providing entry help and information.

1. OPERATING PRINCIPLES FOR MONETARY VALUES

1.1 Selecting one currency per column

The default currency will be the one defined for the user in the **User Profile** screen.

To change the currency:

1. Click on  in the column heading and select **Currency**.
2. Choose the currency you want to use from those available.
   The monetary value will appear along with the name of the currency.

Any VALUE ENTERED by the user or inherited from an element already saved on the platform (for example, the purchase price of a fabric) will NOT BE CONVERTED automatically if the currency for this value is changed. In this case, the value would remain the same.
When a currency is changed, only the values reached through calculation will be modified and recalculated using the rate of the new currency chosen.

2. OVERWRITING A VALUE

2.1 Overwriting a value

Depending on the data type, the column calculation will show a sum or an average.

You can overwrite these calculated values and enter another value manually.

The **entered value** appears in **bold** along with a reminder of the calculated value.

- Only the values of levels N and N+1 can be edited
  N = level selected from the collection structure
  N+1 = all children of selected level N
- The values entered manually are considered intangible.
- For any value entered at any level, only the upper levels will be calculated (sum or average of the children), if and only if they have not been entered manually.
- The (sum or average) calculations of the levels above the entered value take into account this entered value and not the (sum or average) calculation of its children.

2.2 Recalculating overwritten cells

You can force the entered values to be recalculated based on their children. The entered values will then be lost.

To force the calculated value of a field to reappear, simply clear the cell and confirm this empty cell.

3. ENTERING AND CALCULATING OBJECTIVES

It is not realistic for the same person to enter all objectives for the upcoming collection.

Rather, it is a work of collaboration (each person can enter objectives at their own level) that is sometimes compartmentalized (certain users will work only on specific structure levels and only on certain data).

3.1 ENTERING Expected Turnover

Work practices may vary from one company to another; the process explained below is just one example of use.

For turnover, objectives are usually broken down from high to low, whereas consolidation goes from low to high.

The great flexibility of the module now allows you to work differently.

1. At the highest level of the structure, double-click on the **Expected Turnover** column and enter your turnover objectives.
2. Set your objectives manually at each level of the structure in descending order.

Because the **Expected Turnover** column is a consolidated sum based on the values of the lowest level, the different child values are added to the parent level.
The total of all objectives is carried upward to the highest structure level.

As you are entering, imbalances can arise between the main data and the calculated value. You can identify them by visual indicators that appear.
Each user can then decide to rebalance the objectives as they wish.

For example:

Initial objective entered for this level

A negative gap of € 5000 euros appears between the turnover entered for **Man** and the sum of the turnover for **TShirt** and **With Pocket**.

- ⇨ either the user retains the entered value of € 40,000,
- ⇨ or the user recalculates this value automatically (or re-enters a different value)
- ⇨ or the user leaves it as is, knowing that there is a gap

3. You can then compare these objectives using the Turnover calculator that will automatically be offered when the prices and quantities are entered.
   The values for **Expected Turnover**, Price and **Cost** can then be adjusted if necessary to create the best balance between **Expected Turnover** and calculated **Turnover**.

3.2 ENTERING Slot Numbers, Slot Breakdown Numbers, Quantity

Because the **Slot**, **Slot Breakdown** and **Quantity** columns work in a similar manner, we will only explain the steps for defining objectives in terms of **Slots**.

Slots - objectives in terms of the number of products to be developed

Slot Breakdowns = objectives in terms of the number of slot breakdowns to be produced (includes all slots)
Generally these are slot breakdowns by colors.

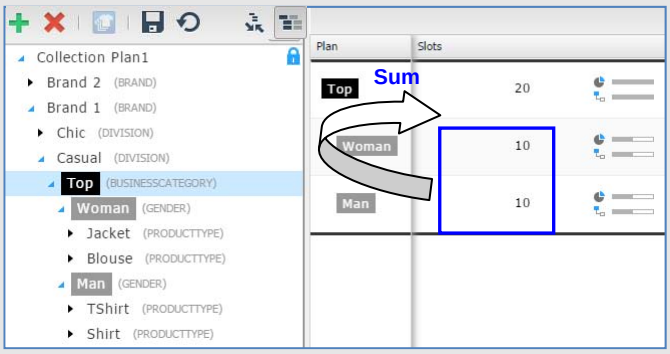
Quantity = projected production quantity

Work practices may vary from one company to another; objectives can be entered in ascending or descending order.

1. At each structure level, enter the objectives in terms of the number of slots to be produced.
   Double-click on the cells and enter the values.

Because the **Slot** column is a consolidated sum based on the values of the lowest level, the different child values are added to the parent level.
The total of all objectives is carried upward to the highest structure level.

For example: fixed objectives in terms of **Slots** for **Top**: sum of its 2 children = 20



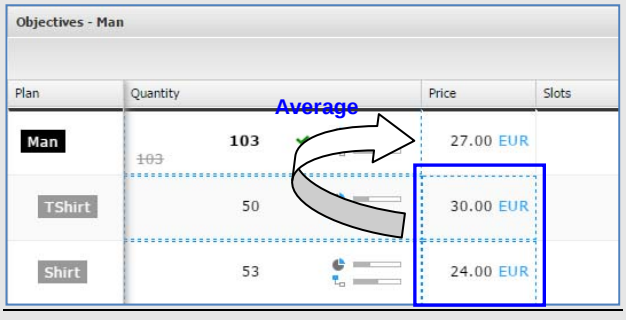
3.3 ENTERING Price

Price = target selling price

1. Navigate to the lowest structure planning levels (those without children) to enter objectives in terms of price.
2. Double-click in the **Price** column.
3. Enter the desired value.
4. Begin entering the targets again at all the lower levels.

Because the **Price** column is calculated as an average based on the values of the lowest level, the different child values are used to display the average at the parent level.
The total of all targets is carried upward to the highest structure level.

For example: average price for **Man**: average of prices of its two children = € 27



3.4 CALCULATING Turnover

Turnover is calculated using values from other columns: Selling **Price** and **Quantity**.

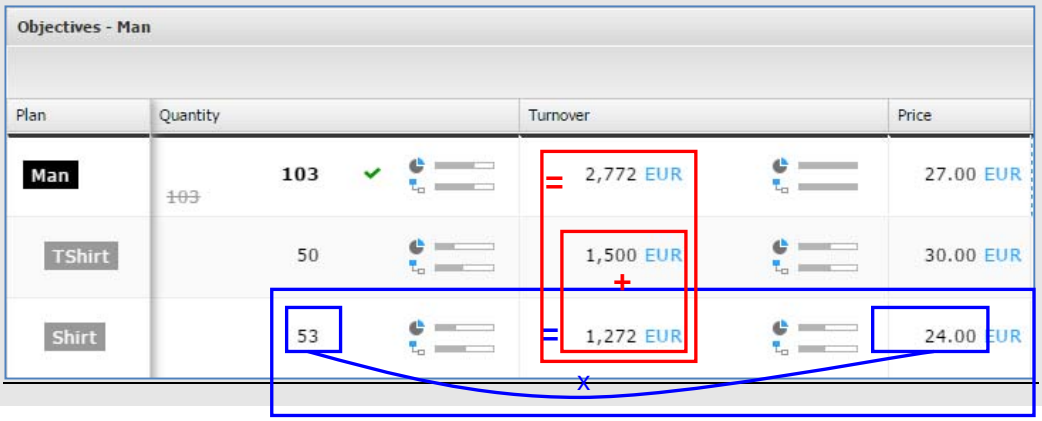
These two data items must be known in order to calculate **Turnover**.

Turnover =	Price x Quantity

Turnover value depends on the currency selected for display.

Because the **Turnover** column is calculated as a sum based on the values of the lowest level, the different child values are added at the parent level.
The total of all targets is carried upward to the highest structure level.

For example: turnover for **Man**: sum of the turnover of its two children = € 2772



3.5 ENTERING Margin

1. Each user chooses the type of margin they want to use from the three proposed (**Coefficient** / **Initial Markup** / **Gross Profit**).
2. Navigate to the lowest structure planning levels (those without children) to enter targets in terms of margin.
3. Double-click in the **Coefficient**, **Initial Markup** or **Gross Profit** column.
4. Enter the desired value.
   The other 2 values are calculated automatically (see table below).
5. Begin entering the targets again at all the lower levels.

Because the **Coefficient, Gross Profit** and **Initial Markup** columns are calculated as an average based on the values of the lowest level, the different child values are used to display the average at the parent level.
The total of all targets is carried upward to the highest structure level.

Coefficient and margins are dependent values.

Entry of a value in the **Initial Markup**, **Gross Profit** or **Coefficient** columns automatically causes the other 2 values to be calculated. If a value has been entered by the user in one of these columns, it will be replaced by the calculated value.

- **Initial Markup** (IMU) : Profit margin shown as a cost percentage (value between 1 and infinity)

$$\frac{\text{Sales price – Cost}}{\text{Cost}} \times 100$$

- **Gross Profit** : Profit margin shown as a percentage of the sales price (value between 1 and infinity)

$$\frac{\text{Sales price – Cost}}{\text{Sales price}} \times 100$$

- **Coefficient**: Ratio between the sales price and the cost.

$$\frac{\text{Sales price}}{\text{Cost}}$$

For example: If Sales price = 150 and Cost = 50

Initial markup = 200%

Gross profit = 66%

Coefficient = 3

	Coefficient	**Gross profit**	**Initial Markup (IMU)**
Coefficient	X1	(Coefficient – 1) / Coefficient	100 X (Coefficient – 1)
Gross profit	1 / (1 – Gross profit / 100)	X 1	100 X (Gross profit / 100) / (1 – Gross profit / 100)
Initial Markup (IMU)	1 + Initial Markup / 100	100 X (Initial Markup / 100) / (1 + Initial Markup / 100)	X 1

3.6 CALCULATING cost objectives

Cost = average target cost

Cost is calculated using values from other columns: Selling **Price** and the margin selected.

These two data items must be known in order to calculate **Cost**.

The user must therefore adjust margins and price to define a maximum cost value not to be exceeded so that target selling prices are respected.

Cost =	Price / (1 + (Gross profit /100))
	or
	Price x (1 - (Initial Markup /100))
	or
	Price / Coefficient

Because the **Cost** column is calculated as an average based on the values of the lowest level, the different child values are used to display the average at the parent level.
The total of all targets is carried upward to the highest structure level.

4. DEVELOPMENT ACTIVITY AND SOURCING TYPE

Additional information such as **Development Activity** and **Sourcing Type** can be filled in starting with the Budget Plan phase if necessary. It will be useful for the development phases.

1. Navigate to the lowest structure planning levels (those without children).
2. In the **Development Activity** column, choose **Main**, **Quick Response** or **Buying** from the list, as applicable.
3. In the **Sourcing Type** column, specify whether imported or locally manufactured products will be used.

The values offered for these two data items can be configured based on the user's needs and can thus be modified (values added or deleted)

FILLING IN THE RANGE PLAN

The range plan is either filled in at the Collection Plan phase by automatic deployment or manually, independently of what is defined in the collection plan.

1. PRE-FILLING THE RANGE PLAN AUTOMATICALLY

Pre-filling the range plan means adding slot breakdowns and slots to the Range Plan based on values entered into the Collection Plan.

To initiate a range plan, you must have at least entered the objectives in terms of slot and slot breakdown numbers.

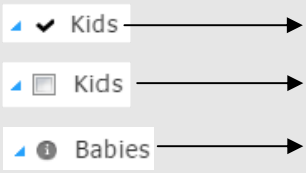
Once it has been pre-filled, redeployment is no longer possible. You will, however, be able to manually add lines in the range plan.

1. Click on  .

To do this the Range Plan must not be in edition.

2. Check the node(s) that you want to deploy in the range plan ☐ => ☑

You can pre-fill node by node or by multiple selection.



3. Once you have made your selection, click on 
.

4. The Range Plan (symbolized by ) is then pre-filled.
Once deployment has been completed, you will have as many slot breakdowns and slots in the range plan as specified during deployment.

For example:

If in the Collection plan: #Slots = 3 and #Slot Breakdowns = 7

- 3 slots will be created with automatically generated slot names: S_1, S_2, etc.
- 7 slot breakdowns will be created with automatically generated slot breakdown names (unique identifier): SB_1 , SB_2, etc.

2. ADDING NEW SLOT BREAKDOWNS/NEW SLOTS

In the range plan, you can manually add new slot and slot breakdown lines.

1. In **Slot Breakdown** view, click on 

as many times as the number of new slot breakdowns you want to add.
2. In **Slot** view, click on 

as many times as the number of new slots you want to add.
3. Enter a unique identifier before saving.
   If the identifier is not entered, the system will generate a unique code.

By default, lines will be created with the following values:

- Deployment - Type = New
- Deployment - Category = Style
- Deployment - Status = Not deployed
- Active
- Default image

WORKING IN THE RANGE PLAN

Two views are available in the range plan: **Slot** view and **Slot Breakdown** view. You can move from one to the other by toggling the button: 

Depending on work practices, you can start working in either **Slot** view or **Slot Breakdown** view (depending on the company)

1. EDIT THE RANGE PLAN

Click on  next to the Range Plan name in the structure.
A lock  is automatically assigned to the plan.

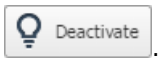
Each Range Plan may be edited by a single user at a time. The different Range Plans may be edited simultaneously.

2. ACTIVATION/DEACTIVATION OF A SLOT BREAKDOWN OR SLOT

When a slot breakdown or slot is being created, it is **active by default**, that is, it is taken into account in plan calculations. You can, however, choose not to consider it in the calculations and therefore exclude it from consolidation reports by deactivating it.

2.1 Deactivation

Deactivating a slot breakdown or slot means no longer taking them into account in the plan (not even for calculations).

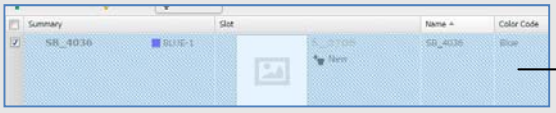
1. Select the slot breakdown/slot to be deactivated.
2. Click on 

.
3. If necessary, enter a reason in the confirmation box.
   This information will be available in the **Deactivation - Reason** column.
4. Confirm to **Deactivate**.

Deactivating a slot deactivates all its breakdowns. On the other hand, deactivating a slot breakdown does not deactivate the slot.

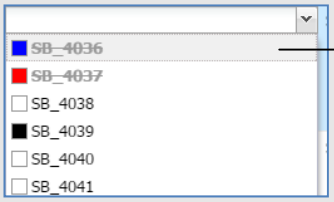
For example:

Slot Breakdown View

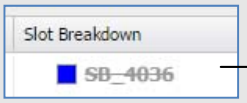


Hatched line => Slot breakdown deactivated

Slot View



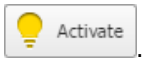
Slot breakdown crossed out => Cannot be associated with a slot because it is deactivated



Slot breakdown crossed out => The slot breakdown associated with a slot has been deactivated is deactivated

2.1 Reactivation

You can reactivate a slot breakdown or slot that has been deactivated. It will again be taken into account for calculations.

1. Select the slot breakdown/slot to be reactivated.
2. Click on 

.

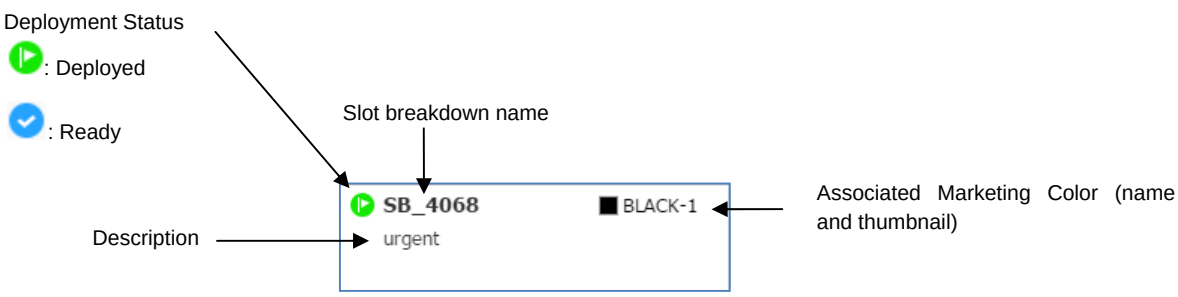
3. SLOT BREAKDOWN VIEW

In **Slot Breakdown** view, the user creates an association with a slot for each slot breakdown.

A lot of other information is also defined for a deployment in development.

3.1 Summary column

As its name indicates, the Summary column synthesizes the information related to the different slot breakdowns.



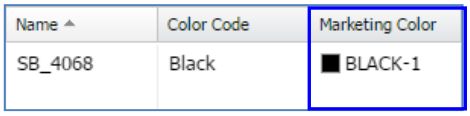
3.2 Color choice

A marketing color must be associated with each slot breakdown.

Double-click in the **Marketing Color** column and choose a marketing color from the list.

Only the first marketing colors are displayed in the list.

To select a color that is not displayed, enter the name of the desired color and use autocomplete to find it.



Mass entry is possible.

3.3 Associating each slot breakdown with a slot

Each slot breakdown must be associated with a slot that is available in the range plan. You can associate slot breakdowns with slots line by line or all at once.

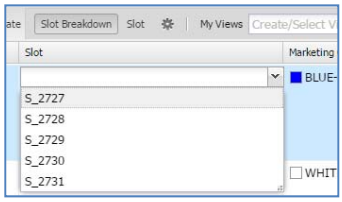
When a slot is selected, its data is also retrieved:

- Its name (In this example: S_1847)
- Deployment status (In this example: **Deployed**)
- Deployment type (In this example: **Carry over**)
- Link to Product Developer, except in the case of a **New** Product (In this example: PLM_56)
- Illustration if present (**Proposal**)

For example:

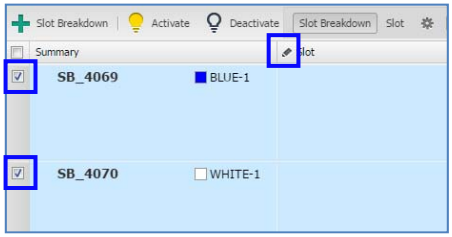
For a single association:

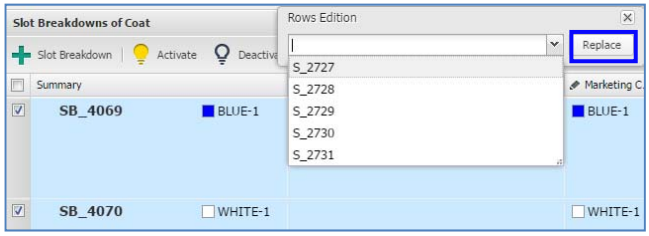
1. Select a slot breakdown.
2. Double-click in the **Slot** column and choose the slot with which you want to associate a slot breakdown.



For multiple association:

1. Select the slot breakdowns that you want to associate with a single slot.
2. In the heading of the **Slot** column, click on  to edit the selected cells.
   From the drop-down menu that appears, choose the slot with which to associate them.
   Click on **Replace**.





3.4 Defining quantities

3.4.1 ENTERING initial Quantity ordered and added Quantity

Initial Quantity = initial quantity ordered

Added Quantity = the quantity that may be added during the season

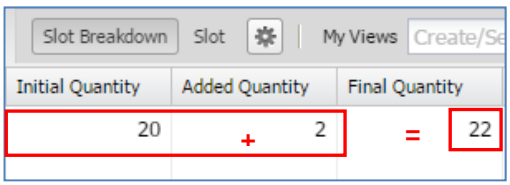
You must enter at least one of the two values

Mass entry is possible.

3.4.2 CALCULATING final Quantity

Final Quantity =	**Initial Quantity** (entered) + **Added Quantity** (entered)

For example:



Quantity Consolidation:

Quantity is consolidated in the banner at the top (i.e., 

), which allows you to compare the quantity projected in the collection plan, the quantity calculated in the range plan and the actual quantity in the product development module if the slot breakdowns have been deployed.

See chapter Quantity Consolidation for further explanation.

3.4.3 CALCULATING estimated material Quantity

Estimated Material Quantity =	**Final Quantity Ordered** (calculated) x **Average Consumption** (entered)

3.5 CALCULATING estimated slot breakdown cost

Estimated cost of the slot breakdown =	**Material Cost** + **Total Trim Cost** + **Cost of Labor**

For example:

Material - Material Cost	Trim - Total Cost	Labor - Total Cos...	Slot Breakdown - Total Cost
30.00 EUR	+ 12.00 EUR	+ 30.00 EUR	= 72.00 EUR

To calculate the estimated cost of the slot breakdown, you must associate a main material with it (to work out its cost), and enter a trim cost and a labor cost.

Calculating the cost of the slot breakdown in the range plan (based on the price of material, labor, accessories) allows you to assess whether it is realistic to launch a slot breakdown in development based on the target cost calculated using the sales price and the desired margin.

Cost consolidation:

Cost is consolidated in the banner at the top (i.e.: 

), which allows you to compare the cost projected in the collection plan, the cost calculated in the range plan and the actual cost in the product development module if the slot breakdowns have been deployed.

See chapter Cost Consolidation for further explanation.

3.5.1 CALCULATING material cost

Material Cost =	**Default Cost** (retrieved from development) x **Average Consumption** (entered)

- The **Default Cost** is a value retrieved from the product development module along with its currency.
- **Average Consumption** is a value to be entered.

1. **Retrieve Default Cost**
   To do this, you must associate a main material with it.
   Double-click in the **Material** column and select the desired material, either directly from the list ( ), or using the material selector ( ).
   This action automatically retrieves:
   - its description,
   - its composition,
   - its quantity
   - its image
   - and its **Default Cost**, along with its currency

   ... which is data that has already been defined in the product development module.
2. **Enter Average Material Consumption**.
   Double-click on the **Material - Average Consumption** column and enter a value without a unit.
3. Material cost is calculated automatically.

3.5.2 ENTERING total cost of trim and labor

You must enter these values in order to calculate the total cost of the slot breakdown.

3.6 ENTERING the margin

1. Each user chooses the type of margin they want to use from the three proposed (**Coefficient/Initial Markup/Gross Profit**).
2. Double-click in the **Coefficient**, **Initial Markup** or **Gross Profit** column.
3. Enter the desired value.

Mass entry is possible.

4. The other 2 values are calculated automatically (see table below).

Coefficient and margins are dependent values.

Entry of a value in the **Initial Markup**, **Gross Profit** or **Coefficient** columns automatically causes the other 2 values to be calculated. If a value has been entered by the user in one of these columns, it will be replaced by the calculated value.

- **Initial Markup** (IMU) : Profit margin shown as a cost percentage (value between 1 and infinity)

$$\frac{\text{Sales price – Cost}}{\text{Cost}} \times 100$$

- **Gross Profit** : Profit margin shown as a percentage of the sales price (value between 1 and infinity)

$$\frac{\text{Sales price – Cost}}{\text{Sales price}} \times 100$$

- **Coefficient**: Ratio between the sales price and the cost.

$$\frac{\text{Sales price}}{\text{Cost}}$$

For example: If Sales price = 150 and Cost = 50

Initial markup = 200%

Gross profit = 66%

Coefficient = 3

	Coefficient	Gross profit	Initial Markup (IMU)
Coefficient	X1	(Coefficient – 1) / Coefficient	100 X (Coefficient – 1)
Gross profit	1 / (1 – Gross profit / 100)	X 1	100 X (Gross profit / 100) / (1 – Gross profit / 100)
Initial Markup (IMU)	1 + Initial Markup / 100	100 X (Initial Markup / 100) / (1 + Initial Markup / 100)	X 1

3.7 CALCULATING Price

Price =	Total cost x (1 + Initial Markup / 100)
	or
	Total cost / (1 - Gross profit / 100)
	or
	Total cost x Coefficient

Price is calculated by using values from other columns: **Total slot breakdown price** and the margin selected.

These two data items must be known in order to calculate **Price**.

The user must therefore adjust the margins and cost to define a maximum price value not to be exceeded so that target selling prices are respected.

Price Consolidation:

Price is consolidated in the banner at the top (i.e.: 

), which allows you to compare the target prices from the budget plan, the price calculated in the range plan and the actual price in the product development module if the slot breakdowns have been deployed.

See chapter Price Consolidation for further explanation.

3.8 Choosing a supplier

If you already know the supplier, you can select it from now on. This information will be useful in the event of deployment in the product development module.

3.9 Associating a document

In the **Document** column, you can choose an **Image** (or a document) to represent your slot breakdown by clicking on ⚙ in the image box  .

3.10 Currency

You can adjust the currency for each slot breakdown.

By default, the currency value set for each slot breakdown will be the default currency from Product Developer.

When a currency is changed, only the values reached through calculation will be modified and recalculated using the rate of the new currency chosen.
The values entered by the user will not be modified even if the currency is changed.

4. PREPARING THE PLANNING / LINKING TO CALENDAR MANAGEMENT

During the range plan's slot breakdown definition phase, you can define in advance the planning for these slot breakdowns (i.e., **Time and Actions**). Thus you should associate them with planning data such as the development process, start or ending dates and planning direction.

It is often necessary to group several slot breakdowns so that they are available at the same time. In this case, they should share:

- the same **Process**
- the same **Planning Dates**
- the same **Planning Direction**

If several slot breakdowns share this same data, at the time of deployment they will be grouped in the same subset of the product to be developed so that they can be developed at the same time.

In **Slot Breakdown** view, select the slot breakdown(s) for which you want to specify planning objectives.

Mass entry is possible, which is particularly advisable here for grouping slot breakdowns for simultaneous development.

4.1 Choosing a process

In the **Process** column, choose a process to be associated with each slot breakdown.

4.2 Choosing the planning direction

In the **Planning Direction** column, choose a planning direction for each slot breakdown: **Forward** or **Backward**.

4.3 Choosing a date

Enter the desired **Planning Date**:

- In the case of forward Planning, this will be the Planning **Start date**.
- In the case of backward Planning, this will be the Planning **Finish date**.

Enter the **Delivery Date - Shop** and/or **Warehouse.**

4.4 Choosing the trigger type

You can decide in advance how subset planning will be triggered once the slots and slot breakdowns have been deployed.

In the **Trigger** column, choose the trigger type for each slot breakdown:

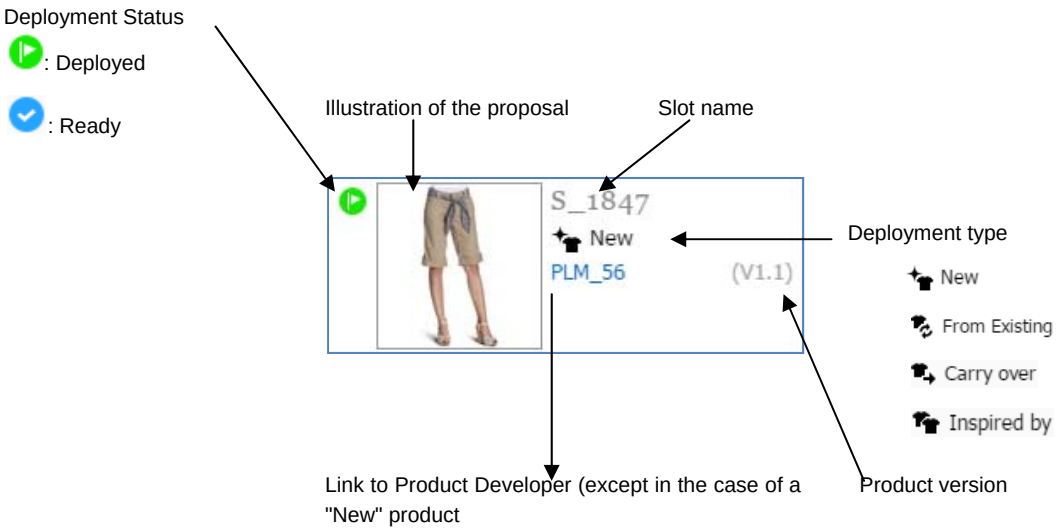
- **Manual**: planning will not launch automatically but will be ready for manual launching. This is the default mode.
- **Auto**: planning will launch automatically at the time of deployment.

For automatically triggered planning to be effective, Process, Planning Date and Planning Direction data must all be filled in.

5. SLOT VIEW

5.1 Summary column

As its name indicates, the **Summary** column synthesizes the information related to the different slots.



5.2 Associating each slot with one or more slot breakdowns

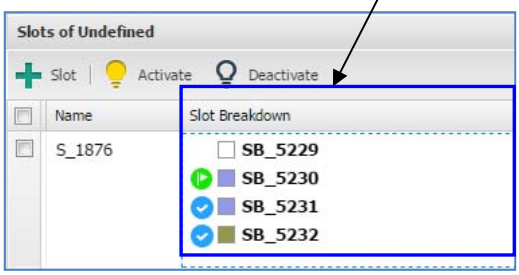
Each slot must be associated with one or more slot breakdowns from those defined in the range plan.

A slot can be deployed to the product development module even if it is not associated with any slot breakdown.

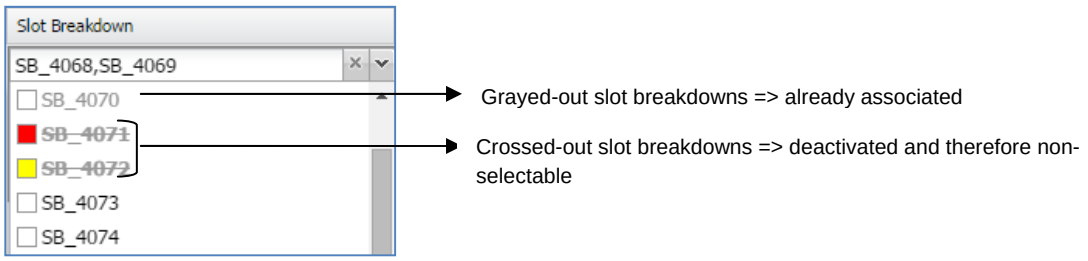
When a slot breakdown is selected, its data is also retrieved:

- Its/their name(s) (In this example: **SB_5229, SB_5230, SB_5231** and **SB_5232**)
- Deployment status (In this example: **Ready** for slot breakdown **SB_5231** and **SB_5232** and **Deployed** for slot breakdown **SB_5230**)
- Marketing Color

For example:



1. Select a slot.
2. Double-click in the **Slot Breakdown** column and choose the slot breakdown(s) to be associated with this slot.



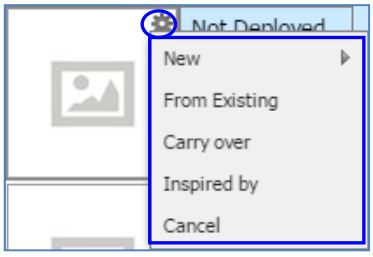
5.3 Associating a size range

If you already know the size range, you can select it now. This information will be useful in the event of deployment in the product development module and will be added to the product's attributes.

5.4 Choosing deployment type - Presenting a proposal

Once the budget has been accepted, the user can then define the content of the collection plan by proposing slots and slot breakdowns which, once combined, will make up the plan. These slots can then be used to create style products in the product development module.

The slots can be used to create new styles, but they can also be attached to existing styles.



This information will be retrieved in the **Summary** column (Image/Deployment Type/Possible link with Product Developer product)

The **Deployment Type** column will also update based on the selection made in the **Proposal** column.

Refer to chapter Implications of Deployment in Product Developer for further explanation on the effects in the product development module.

5.4.1 Deployment by style creation - New

By default, when creating a new slot, its deployment type is defined as **New**, which means that the slot defined in the range plan will be used as a basis for the creation of a new style product the product development module (and the only information is that contained in the slots and slot breakdowns).

1. In the **Proposal** column, you can choose an **Image** to represent your new future product by clicking on ⚙ in the image box  .

   Select **New**, then:

   - **Choose**: to choose an image to represent this new future product on the platform (you can choose from among **All textiles/Nest/Filled-in Drawing/Document Illustrator/3D Style/Marker/Other Files**)
   - **Select from the computer**: to choose an image on the user's workstation.

2. In the **Deployment – Category** column, select the category for the product to be deployed.

Choice of category for the product to be deployed

When deployment type is set to **New**, the user is deciding to create a new product. The user can choose from:

- The default category: Style
- A sub-category of customized Styles (if defined)

5.4.2 Deployment by attaching the slot to an existing style - From Existing/Carry over/Inspired by

The user can decide to attach a slot to an already existing Style product, either for inspiration, to carry it over or for versioning.

1. In the **Proposal** column, click on ⚙ in the image box  .
2. Select:
   - **From Existing**: a style already created for this purpose early on by the Stylists.
   - **Carry over**: the creation of a new version of an existing style. This one is versioned, and reuses all of its information + the addition of data from the range plan (classification, size range, marketing colors, SKU and **Color Plan** type subsets) Modifications can still be made (colors/price, etc.)
   - **Inspired by:** this is the copy of an existing style (equivalent to "save as.")
     It is therefore a new product (new identifier) that reuses all of the product information that inspired it + the addition of data from the range plan (classification, size range, marketing colors, SKU and **Color Plan** type subsets)
3. In the window that opens, choose the style you wish to attach to the new slot and click on  **Choose**.

5.4.3 Canceling a slot's attachment to an existing style

1. In the **Proposal** column, click on ⚙ in the image box  .
2. Select **Cancel**.
   Deployment type is repositioned on **New**.

DEPLOYMENT IN PRODUCT DEVELOPER

To deploy means to initiate the development of a style product using the data defined in the range plan,and involves, in particular:

- the creation of new styles and/or the updating of new styles and/or the reuse of existing styles (based on the proposals made for each slot)
- the creation of **SKU Color Plan** references corresponding to the slot breakdowns deployed
- the creation of **Color Plan subsets** to monitor the development of a group of slot breakdowns based on their planning data

Refer to chapter Implications of Deployment in Product Developer for further details on the effects of deployment in Product Developer.

Deployment can be performed:

- in **Slot** view: deployment of the slot with all its slot breakdowns that have **Ready** status.
- in **Slot Breakdown** view: deployment of all or a selection of slot breakdowns.

Deployment can be performed in numbers (several slots and/or slot breakdowns at once).

The Range Plan's **Objectives** banner displays data from Product Developer for the purpose of continually comparing the budget plan (what has been projected), the range plan (what is real) and development (what has been done).

1. DEPLOYMENT PREPARATION

1.1 Conditions necessary for deploying a slot/slot breakdown

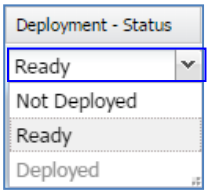
- Deployment status must be displayed as **Ready**
  AND
- the slot or slot breakdown must be active

1.2 Conditions necessary to change deployment status to Ready

- A slot: must be active
- A slot breakdown:
  - must be active
  - must be associated with a slot that is **Ready** or **Deployed**
  - must have a marketing color

1.3 Changing slot status to Ready

Double-click in the **Deployment - Status** column and choose **Ready** from the list.



2. DEPLOYMENT IN THE PRODUCT DEVELOPMENT MODULE

Once the deployment conditions have been met, you can deploy to Product Developer.

- If a slot is associated with several slot breakdowns ➔ only slot breakdowns with **Ready** status will be deployed.
- If several slots are deployed at the same time ➔ only slots with **Ready** status will be deployed.
- If several slot breakdowns are selected for deployment ➔ as many products as there are slots will be created.

  For example:
  If 3 slot breakdowns corresponding to 2 slots are selected ➔ 2 products will be created in Product Developer
- In the event of an error in the deployment of one slot breakdown, the deployment of the other slot breakdowns will continue.

1. Deployment can be performed:
   - in **Slot** view: deployment of the slot with all its slot breakdowns that have **Ready** status.
   - in **Slot Breakdown** view: deployment of all or a selection of slot breakdowns.
2. Whether you are in **Slot** or **Slot Breakdown** view, select the ones you want to deploy.
3. Click on Deploy.

To do this the Range Plan must not be in edition.

4. After deployment, the following data will be modified in the slot breakdown(s):
   - **Deployment - On**: deployment date
   - **Deployment - By**: user who performed the deployment
   - **Deployment - Status**: "Deployed"
5. A message informs the user when deployment is complete.

   For example:

6. **Deployed** status is indicated by in the **Summary** column.

3. CANCELING A SLOT DEPLOYMENT

Once slot deployment has taken place, you can go back and cancel it. This means breaking the association to the style product it was attached to during deployment. The style, however, will be kept.

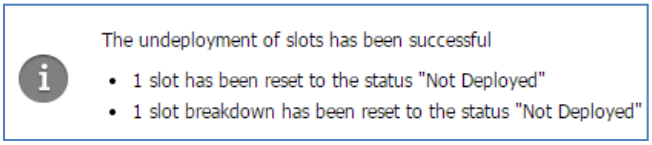
The slot returns to the initial status it had before deployment. All slot breakdowns attached to it also return to **Not Deployed** status.

1. In **Slot** view, select the slot(s) for which you want to cancel deployment.
2. Click on Undeploy.

To do this the Range Plan must not be in edition.

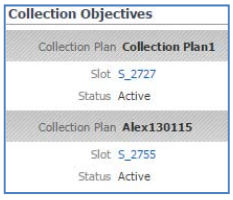
7. After deployment, the status of the slot and its breakdowns is reinitialized to **Not Deployed**.
3. A message informs the user when cancellation is complete.

For example:



4. DEPLOYMENT IMPLICATIONS IN PRODUCT DEVELOPER

Based on the product **Proposal** chosen (**New/From Existing/Carry Over/Inspired by**), the effects in Product Developer will be different.

		Proposal Type			
		New	**From Existing**	**Carry over**	**Inspired by**
In the Range Plan	Creates a link in the slot to the style product just created in Product Developer	X			X
	Updates the **link** in the slot to the style product carried over in Product Developer (incrementation of the product's version number)			X	
In Product Developer	Creates a new product with a unique identifier generated automatically Naming convention for new products: **PLM_#** (number incremented automatically)	X			X
	Adds the slot breakdown's **classification** (values from the collection plan structure) to that of the style	X	X	X	X
	Adds **range plan information** to that of the style (Description, Comments, Colors, size range, etc.) (In **Attributes** > **Colors** In **Attributes** > **Sizes**), etc.	X	X	X	X
	Retrieves all **data from the existing style**		X	X	X
	Creates **hypertext links** to the deployed slots from the range plan with status (In the product's general **Objectives**) 	X	X	X	X
	Creation of Color Plan SKUscorresponding to deployed slot breakdowns	X	X	X	X
	Creation of **Color Plan subsets** corresponding to deployed slot breakdowns	X	X	X	X

4.1.1 Creation of Color Plan SKU based on slot or slot breakdown deployment

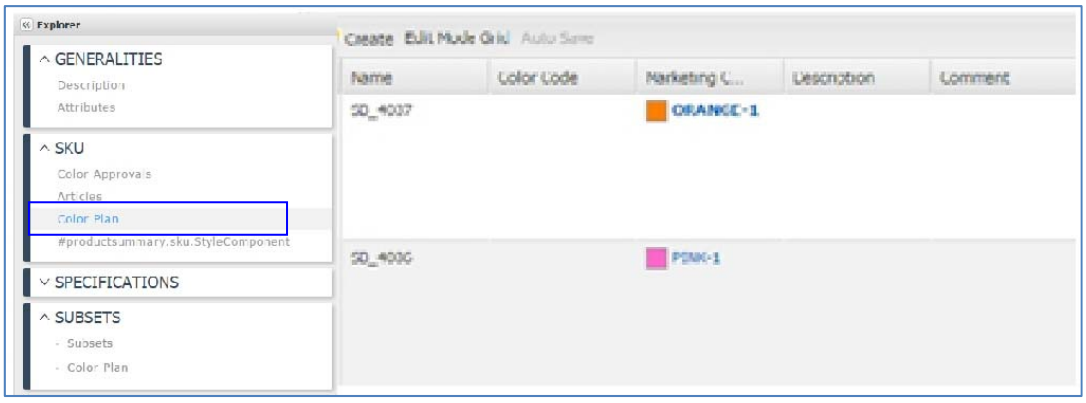
A new type of SKU, with **marketing color** as its variation attribute, is available by default: **SKU Color Plan**.

Following deployment, the number of Color Plan type SKU references created matches the number of slot breakdowns deployed.

Each new SKU reference inherits slot breakdown data from the range plan:

- Marketing Color
- Description
- Comment
- Appendices (documents, illustration, etc.)

For example:



In the event of deployment using an existing style, or redeployment, the marketing colors that did not exist on the style are added to the SKU already created.

4.1.2 Creation of Color Plan subsets based on slot or slot breakdown deployment

A new type of subset is available by default: **Color Plan Subset**.

This varies in terms of **marketing color** and has **planning data**.

If several slot breakdowns attached to the same slot have common planning data (which means that they should be developed at the same time and therefore follow the same plan), they will be grouped in in a single Color Plan subset.

Slot breakdown grouping rules:

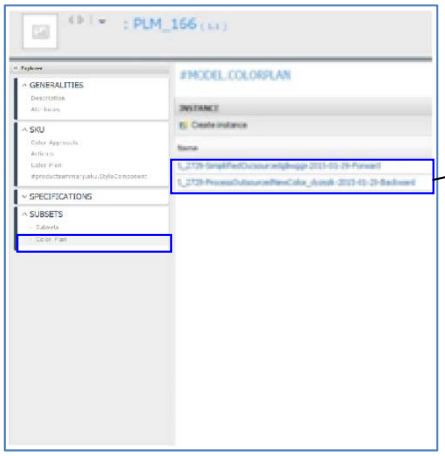
- Same process
- Same planning direction
- Same planning date

The subsets are filled in using data from the slot breakdowns (marketing colors and planning data)

In the event of redeployment:

- If a new slot breakdown has to be added for development at another time ➔ a new subset is created.
- If a new slot breakdown has to be added that needs to follow the same plan as the others already grouped in a subset ➔ the marketing color is added to the domain of the existing subset.

For example:



2 Color Plan subsets were created during the deployment of a slot for the PLM_166 product in Product Developer because the slot breakdowns should not be developed at the same time.

Each of them has different slot breakdowns with different planning data.

Refer to the process manual **Calendar Management-Process Manual** for more details about planning.

5. DELETING A PRODUCT IN PRODUCT DEVELOPER

You cannot delete a product that is attached to a slot.

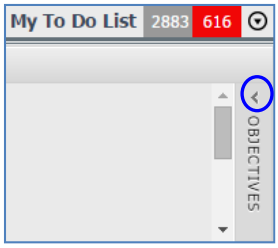
The user will be informed of this by an error message.

To delete it, you must break the link with the slot by canceling deployment (See Canceling Slot Deployment).

REPORTS AND DATA CONSOLIDATION

1. PRESENTATION OF THE OBJECTIVES BANNER

The **Objectives** banner, visible in the Range Plan, drops down when you click on 



Objectives banner expanded

You can compare:

- No. of slots
- No. of slot breakdowns
- Quantity: Sum of slot breakdown quantities
- Cost: weighted average cost of slot breakdowns
- Price: weighted average distribution price of slot breakdowns

Inactive slots and slot breakdowns are not accounted for in these consolidated calculations.

This data is displayed along with its currency.

The different counters are updated in real time as adjustments are made.

The aim of such consolidation is to provide a comparative display of three levels of data:

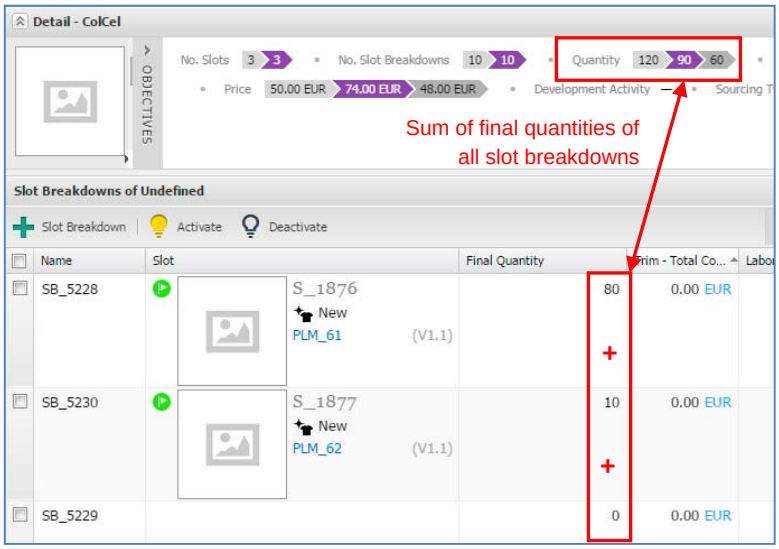
- Budget plan data, the values initially projected and continually reviewed during the season or sales period.
- Range plan data, defined by the merchandisers based on slots and slot breakdowns of the plan, which is constantly evolving in relation to budgetary objectives.
- Product Developer products that relate to the slots/slot breakdowns defined in the range plan.

2. QUANTITY CONSOLIDATION

Quantity is consolidated at the top in the banner, which allows you to compare the quantity projected in the budget plan, the quantity calculated in the range plan and the actual quantity in Product Developer if the slot breakdowns have been deployed.

Data feedback from the Range Plan:

Quantity = sum of final slot breakdown quantities

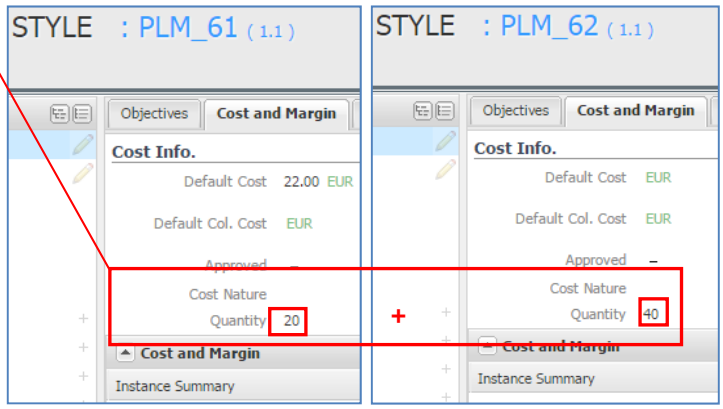


Data feedback from Product Developer:

Quantity = sum of quantities of products linked to slots from the range plan concerned

For each product linked to the slot, a quantity is defined.

For example:
For product PLM_61 (associated with S_1876), the quantity is **20**
For product t PLM_62 (associated with S_1877), the quantity is **40**



3. COST CONSOLIDATION

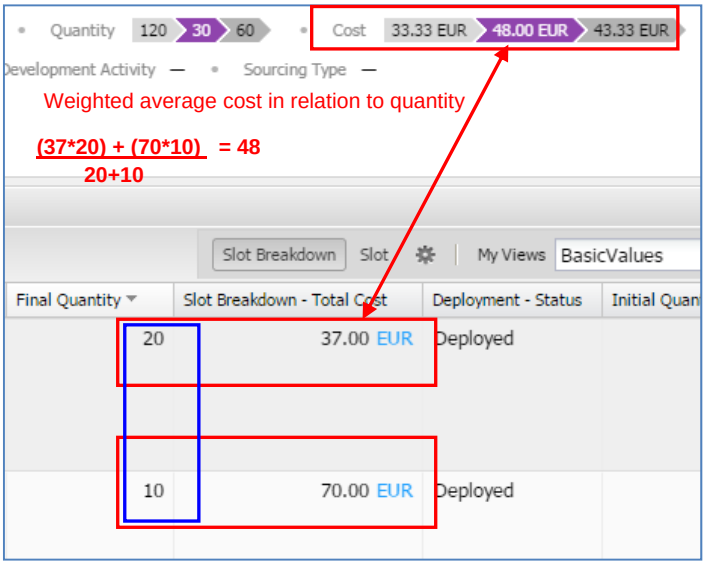
The **Cost** of slot breakdowns is consolidated in the banner at the top; it includes total costs (material/accessories/labor) for all active slot breakdowns in the range plan.

This consolidation allows you to compare:

- projected cost in the budget plan:
- calculated cost in the range plan
- actual cost in Product Developer if the slot breakdowns have been deployed.

Data feedback from the Range Plan:

Cost = weighted average cost in relation to the final quantity

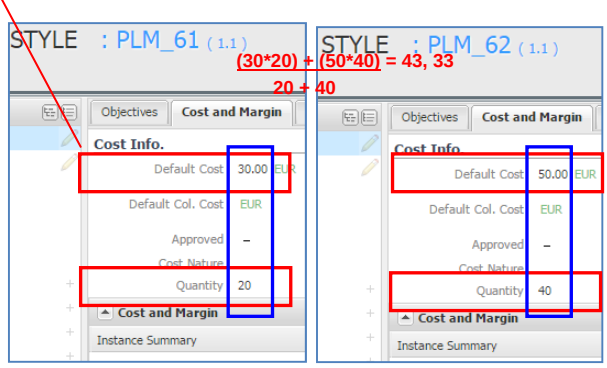


Data feedback from Product Developer:

Cost = weighted average cost of products linked to slots from the range plan concerned/actual quantity

For each product linked to the slot, a cost is defined.

For example:
For product PLM_61 (associated with Slot S_1876), the cost is **30**
For product t PLM_62 (associated with Slot S_1877), the cost is **50**

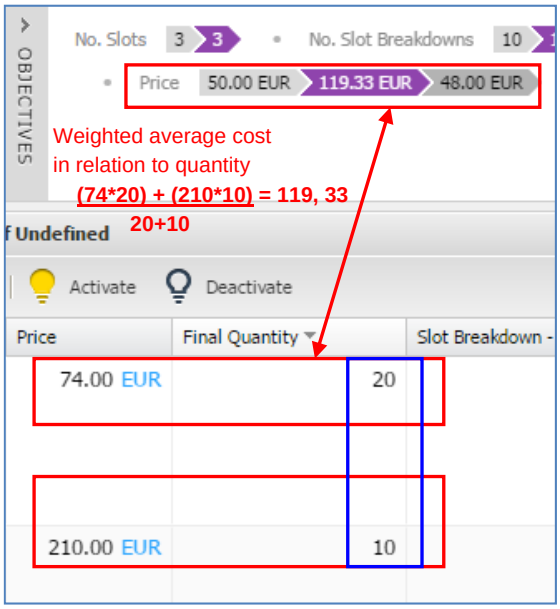


4. PRICE CONSOLIDATION

Price is consolidated in the banner at the top, which allows you to compare the target prices from the budget plan, the price calculated in the range plan and the actual price in Product Developer if the slot breakdowns have been deployed.

Data feedback from the Range Plan:

Price = weighted average price in relation to the final quantity



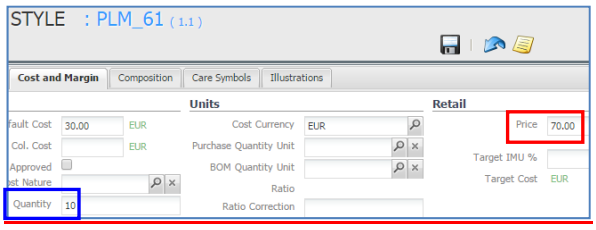
Data feedback from Product Developer:

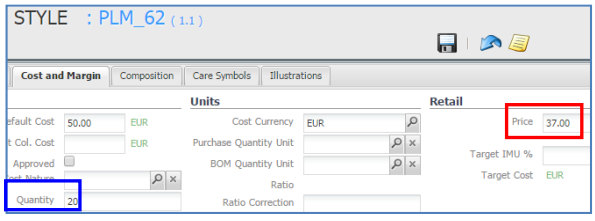
Price = weighted average price of products linked to slots from the range plan concerned/actual quantity

For each product linked to the slot, a price is defined.

For example:
For product PLM_61 (associated with Slot S_1876), the price is **70**
For product PLM_62 (associated with Slot S_1877), the price is **37**

(37*20) + (70*10) = 48
20+10





5. GENERATING REPORTS

The different Collection Plan data (Budget plan and Range plan) can be used in different specific reports that can be generated at any time and saved in the File manager.

1. In the structure, select the plan to generate its report.

The plan must not be in edit mode.

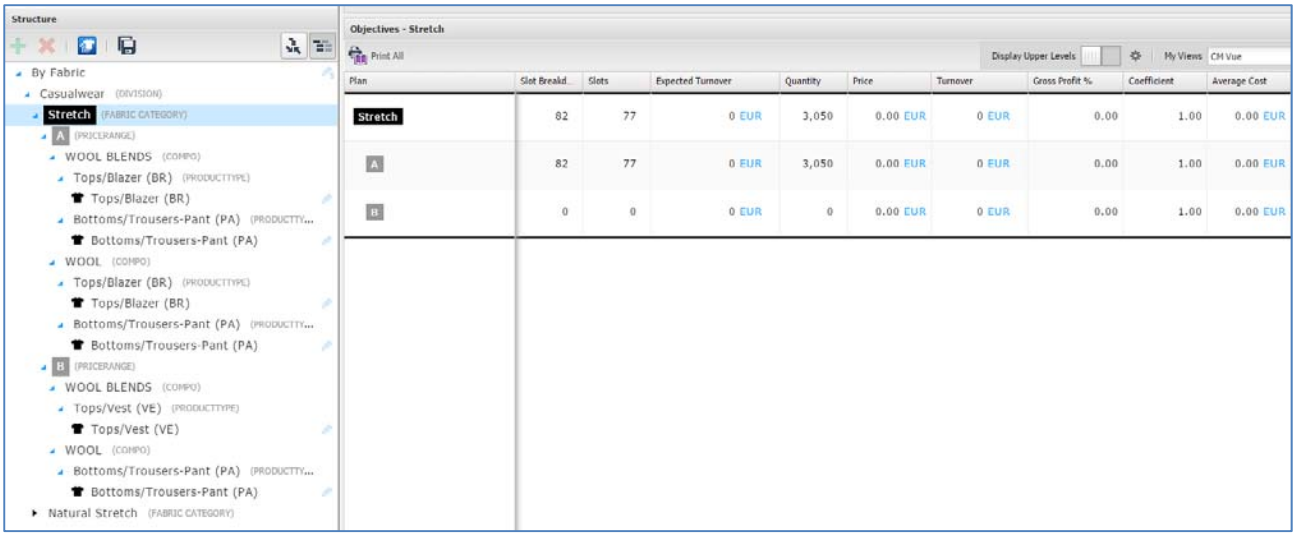
2. Click on 

.
3. In the window that opens, customize the report request and generate the report by clicking on  .

To get more information on reports, refer to Printing chapter of the *Lectra_Enterprise_Solutions_V4R2_Platform-Common-features_User-Guide*.

6. EXTRACTIONG / INTEGRATING DATA VIA ETL

Collection plan data can be extracted / integrated via ETL.



	A	B	C	D	E	F	G	H	I	J	K
1	Structure	Structure	Structure	Structure	Structure	Integer	Integer	Currency	Integer	Currency	Currency
2								EUR		EUR	EUR
3	Division	Fabric Category	PriceRange	Compo	ProductType	Slot Breakdo	Slots	Expected Turnover	Quantity	Price	Turnover
4	Casualwear	Stretch	A	WOOL BLENDS	Tops/Blazer (BR)	12	12	0	1 350	0,00	0
5	Casualwear	Stretch	A	WOOL BLENDS	Bottoms/Trouser	10	5	0	1 000	0,00	0
6	Casualwear	Stretch	A	WOOL	Tops/Blazer (BR)	35	35	0	250	0,00	0
7	Casualwear	Stretch	A	WOOL	Bottoms/Trouser	25	25	0	450	0,00	0
8	Casualwear	Stretch	B	WOOL BLENDS	Tops/Vest (VE)	0	0	0	0	0,00	0
9	Casualwear	Stretch	B	WOOL	Bottoms/Trouser	0	0	0	0	0,00	0
10											

GLOSSARY

Hierarchy: ordered list of classification criteria

Carry over: Product reinserted into the collection plan from a previous one with slight adjustments (mainly price and colors)

Coefficient: Ratio between the sales price and the cost.

Collection Planning: name of the planning module for the collection plan **Collection plan**: contains planning for the product lines including financial, volume, distribution, sourcing information. Can be broken down into different views: budget plan, range plan.

Range plan: Detailed definition of product projects and their slot breakdowns. It is derived from the budget plan. Once the budget has been approved, the range plan is pre-filled with projects and slot breakdowns from the collection plan objectives in terms of the number of slots and slot breakdowns. These slots and slot breakdowns are detailed with their colors, the costs, the price, the material…

Budget plan: Breakdown of financial objectives according to the collection structure.

Slot: Product brief. Objectives for marketing a product. Forecast for a product to be developed
It is defined at the range plan level.

Slot breakdown: Product element to be developed, usually a color reference (product in a given color).

Subset: Grouping of variations of a product according to characteristics they share (size, color, supplier). Allows a Calendar Management tracking.

Gross profit: Profit margin shown as a percentage of the sales price

Initial Markup (IMU): Profit margin shown as a cost percentage