

## Merchandise Financial Planning (MFP) Business Essentials 13.2

**Duration:** 2 Days

### What you will learn

This course begins with an overview of the Oracle Retail Product Suite. Then, it specifically addresses the Merchandise Financial Planning solution including the business process flow and how this solution integrates with others in the product family. The course breaks the business process flows into pre-season and in-season planning activities and explores the tasks and responsibilities of various roles during these periods.

**Learn To:**

Create detailed financial plans for both Pre-Season and In-Season planning

Provide the various roles involved in planning individualized work flows through the use of workbooks to complete their financial planning tasks

Provide a mechanism by which plans are communicated through the various levels of responsibility within your organization

Provide a mechanism by which to submit plans for approval that is seamless and efficient

### Audience

Business Analysts

End Users

Functional Implementer

Sales

Sales Consultants

System Integrator

Team Leader

Technical Consultant

### Course Objectives

Describe the basic types of planning and planner roles

Use the Oracle Retail RPAS Merchandise Financial Planning tool to develop plans for three significant roles

Analyze and execute the process flow steps for both Pre-Season and In-Season planning based upon responsibilities per role

Describe the evolution of plan type as plans move through Pre-Season and In-Season time periods

Identify and utilize the views in Merchandise Financial Planning that support each step of the Pre-Season and In-Season planning process according to role

## **Course Topics**

### **Course Introduction**

- Introduction
- Getting the most out of training
- Course Agenda
- Course Objectives

### **Overview**

- Course Agenda
- Lesson Objectives
- Merchandise Financial Planning Overview
- Planner Roles
- Retail Footprint
- Integration
- MFP Cost vs Retail

### **Business process**

- Agenda
- Objectives
- Role responsibilities
- Pre-season Process Flow
- In-season Process Flow
- Plan versions
- Plan reconciliation
- Measures

### **Pre-Season-Top Down-Getting Started - Seed the Plan**

- Agenda
- Objectives
- Pre-Season Planning Process Flow - Top Down
- Top Down Role Responsibilities
- Seeding
- Seeding Considerations

### **Pre-Season-Top Down-Develop Targets**

- Agenda
- Objectives
- Target Setting
- Reference Measure Profile
- Sales Planning
- Receipt and Inventory Planning
- Gross Margin Planning

### **Pre-Season-Top Down-Publish Targets for Middle Out Role**

- Agenda
- Objectives

Pre-Season Planning Process Flow - Top Down  
Review Targets Task  
Review Plan Task  
Publishing Targets

### **Pre-Season-Middle Out-Seeding the Plan**

Agenda  
Objectives  
Pre-Season Planning Process Flow - Middle Out  
Middle Out Role Responsibilities  
Seeding  
Seeding Considerations  
Set Beginning of Season Inventory

### **Pre-Season-Middle Out-Review Strategic Targets**

Agenda  
Objectives  
Pre-Season Planning Process Flow - Middle Out  
Target Overview View  
Target Overview Measures  
Key Considerations

### **Pre-Season-Middle Out-Create Sales, Markdowns, Receipts, Inventory and Gross Margin Targets**

Agenda  
Objectives  
Pre-Season Planning Process Flow - Middle Out  
Efficient Order  
Sales and Markdowns  
Receipts and Inventory  
Gross Margin  
Evaluation

### **Pre-Season-Middle Out-Review and Reconcile Department Targets**

Agenda  
Objectives  
Pre-Season Planning Process Flow - Middle Out  
Plan Reconciliation  
Plan Review View  
Target Reconciliation

### **Pre-Season-Middle Out-Publish Targets and Plan Approval**

Agenda  
Objectives  
Pre-Season Process Flow - Middle Out  
Publish Targets  
Review Approval Status  
Review Department Plan  
Measure Profiles  
Approve Plan

### **Pre-Season-Bottom Up-Seed the Plan**

Agenda

Objectives

Bottom Up Role Responsibilities

Pre-Season Planning Process Flow - Bottom Up

Seeding

Set Beginning of Season Inventory

### **Pre-Season-Bottom Up-Review Targets**

Agenda

Objectives

Pre-Season Planning Process Flow - Bottom Up

Target Overview

Review Department Targets

Key Considerations

Retrieving Updated Department Targets

### **Pre-Season-Bottom Up-Create Sales, Markdown, Receipt, Inventory and Gross Margin Plan**

Agenda

Objectives

Pre-Season Planning Process Flow - Bottom Up

Efficient Order

Sales and Markdowns

Measure Profiles

Receipts and Inventory

Gross Margin

### **Pre-Season-Bottom Up-Plan Reconciliation**

Agenda

Objectives

Pre-Season Planning Process Flow - Bottom Up

Considerations

Review Plan/Reconcile Targets

Review Item Plan

### **Pre-Season-Bottom Up-Submit Plan for Approval**

Agenda

Objectives

Submit Plan

Commit Working plan

Manager Involvement

### **In-Season Planning**

Agenda

Objectives

Top Down In-Season Planning

Middle Out In-Season planning

Bottom-Up In-Season Planning