Purchase Order Allocator (POA) Training

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POA Overview

What is POA?

POA stands for Purchase Order Allocator. Rally House places all PO's as bulk orders. In order to ensure delivery to correct location and correct item based on a multitude of factors. POA is the automated process that allocates these bulk orders as store direct purchase orders.

Required field hierarchy moves from the item to silhouette, to the vendor.

Grouping goes from Ship date, to PO Type, to PO Grouping.

Blanket bulks must have ONE style per PO for the POA to run correctly.

POA Order of Operations

1. Distribution Type (on PO)
2. Allocation Requirement (on PO)
3. Ship Date (on PO)
4. PO Type (on PO)
5. PO Grouping (silhouette>vendor)
6. Max Units Per Box (silhouette>class mapping)

Order Creation Timeline

1. The system looks at ship dates Monday through Sunday window plus the Vendor/PO Allocation Lead Time to find eligible items to group on a PO.
    a. The ship date will get set based on the latest ship date of all bulk POs that were grouped
2. Buyer - O Allocation Days
    a. By setting the day of the week, POA will generate Store Allocation POs by 8:30AM that morning. These Store Allocation POs will include all bulk POs that require allocation up to and including the next 7 days.
3. Any store that has an OTB stop date less than 120 days out will not get allocated POs
4. Stadium stores & Y SAM value stores will not get allocated POs

POA Merchandising Tab Searches

1. **POA Created POs UnSent**
    a. This search shows all allocated POs that were created via POA
    b. This search should be used to set Buyer PO Status to Sent and Integration Status to Ready (EDI vendors only)
2. **PO Export-POA Vendor View**
    a. Use this search to export & send to vendors
    b. Do not use this search to import on anything
3. **POA POs Pending Allocation (POA Center Category)**
    a. This shows all open bulk orders that have not been fully allocated
4. **POA Errors (POA Center Category)**
    a. This search shows bulk orders that were unable to be allocated
    b. To clear POA error search, update the Allocation Status on the PO to Pending Allocation

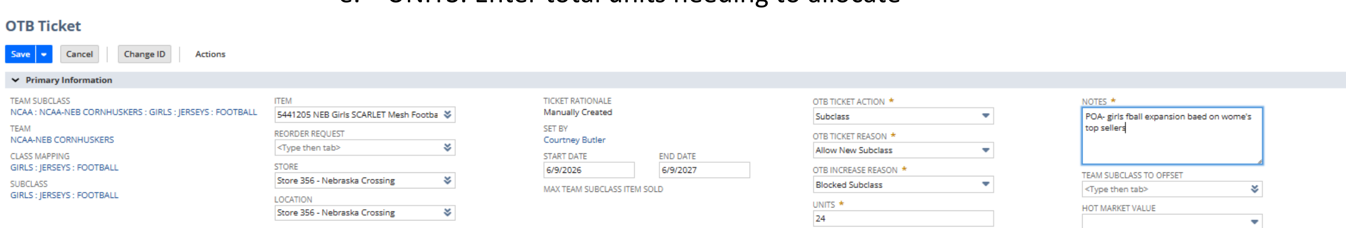
c. **Common errors & how to solve**

i. 2x CMS
   1. See OTB ticket instructions
   2. Or reduce quantity on order

ii. Did not meet PO $ Minimum
   1. Check that MOQs, PO Types, PO Groupings, etc are all set correctly
   2. Create more bulks within the ship date range
   3. Lower PO $ Minimum on bulk PO
   4. Manually allocate

iii. Missing UPCs
   1. Add your UPCs on the line level

iv. No eligible stores - check assortment manager and OTB budgets
   1. TSC is blocked in all stores. Buyer must review the TSC and take the correct action.
   2. If the decision is to keep the product, create OTB tickets from the style or TSC to unblock locations needed to allocate all units.
   3. Review the status of any open otb tickets in that style.
   4. To unblock, create OTB ticket using these options
      a. OTB TICKET ACTION: Subclass
      b. OTB TICKET REASON: Allow New Subclass
      c. OTB INCREASE REASON: Blocked Subclass
      d. STORE: only need to fill out if you are unblocking a specific store. IF left blank, POA will unblock in the top SAM values based on CMS data.
      e. UNITS: Enter total units needing to allocate



   1. If the decision is to cancel the item, create PO MOD on the item level and request a cancellation.

ii. PO quantity (9) is below minimum order quantity (12) — increase PO to at least 12 units
   1. There is not enough units left on the bulk PO to hit the MOQ of 12.
      a. Review Vendor-POA Fields for Parent Location MOQ and Parent MOQ Round To
      b. Review the currently allocated PO's for size scale accuracy.

i. Was the style setup with the correct Size Scale requirement?

c. If open size scale, add the additional units needed to a blanket release PO already created.

Required & Relevant Fields

1. **Vendor Fields**
   a. Parent Location MOQ
      i. The location MOQ by default for each parent, can be overriden by values at Silhouette and parent
   b. Parent MOQ Round To
      i. The round to units (like ship in 1’s, 6's, 12's) by default for each parent. This can be overriden by values at Silhouette and parent, if round to is greater than 1, then units will be a multiple of this
         1. If MOQ is 12, round to 3, POA allocation will be minimum 12 units per door, then increased by 3 (12,15,18,21,24)
   c. Auto allocation Max Items Per PO
      i. The max amount of styles allowed on a PO
      ii. Hardlines and accessories is 12
      iii. Single sized hats is 6
      iv. Sized items is 4
   d. PO Allocation Lead Time
      i. Used to determine the number of days before PO Ship Date that allocations are due as required by vendor.
         1. Integer field- default 90 days
   e. PO Grouping
      i. How POA determines which styles to group together on a PO. The grouping for the vendor, can be changed at silhouette.
   f. Minimum Dollar Amount
      i. The minimum dollar amount a PO must meet for PO to allocate
         1. Defaults to 75
   g. Allow NSO ship date changes
      i. field is used by POA to determine if vendor allows NSO PO’s ship date to change for New stores.
   h. SAR Buyer

            i. Hardlines & accessories only- determines the buyer assigned to the allocated PO
    i. SAR Cancel Date Lead Time
        i. This is used for drawdown bulk POs. The default it 14 days. This will calculate the amount of days out from the ship date to set the cancel date
    j. Vendor PO Export Status
        i. Approved
            1. These will allocate right away if within the PO Allocation Lead Time
        ii. Pending Vendor Approval
            1. If order is written within the PO Allocation Lead Time and the vendor needs to verify inventory and blanket bulks first then this will delay allocation until you flip to Approved on the PO

2. **Silhouette Fields**
    a. These fields will override vendor fields
    b. PO Grouping
        i. How POA determines which styles to group together on a PO. This will override the vendor grouping.
        ii. Default is standard
    c. Maximum Units per Box
        i. The maximum amount of units in the largest box that a vendor supplies. For example, hats can ship in 12, 36 or 72 unit boxes. In that case, the value would be 72.
            1. Default is from class mapping fields. Silhouette overrides the class mapping fields
            2. If applicable use case pack quantity
                a. 4 blankets ship in a box, max units per box=4
        ii. The goal is that each PO ships in a single box
    d. Parent Location MOQ
        i. Minimum by Parent Style Shipped to Individual Location - Example, Vendor requires 12 units (any size combo) per location
    e. Parent MOQ Round To
        i. Minimum Increment by Parent Style Shipped to Individual Location - Example, a Vendor requires a minimum of 12 units per location but allows increments of 1 unit above the minimum. Some may require 3 or 6 or 12 unit increments.

f. Size Scale Requirement
   i. determines fixed size scale vs open size scale
g. Casepack Size Scales
   i. determines the percentage of units allocation by size for the silhouette
   ii. If it doesnt exist, default to calculated casepacks based on sales history. IF not enough history, default to blanket PO SizeScale
h. SAR Cancel Date Lead Time
   i. This is used for drawdown bulk POs. The default it 14 days. This will calculate the amount of days out from the ship date to set the cancel date
i. Decoration Process
   i. This will be used in PO grouping
      1. Vendors use different warehouses for different decoration processes
j. Silhouette Reorder Request optional fields to create blanket bulk
   i. Silhouette SAR Bulk MOQ
      1. Production minimum
         a. Example: To get a bobblehead created you must order 144 units. If you order 96 order will not create.
   ii. Silhouette SAR Bulk Round To
      1. Minimum Total Increment by Parent Style. Example, Vendor requires 72 but will allow 1 unit increments over 72. Some vendors require 3, 6 or 12 unit increments.
         a. Example: if round to is 6 and you order 98 it will not create

3. **Item Fields**

   a. MOQ fields will override the silhouette & vendor if filled out on the item
   b. Optional fields for PO grouping
      i. Marketing Event
      ii. Season Code
      iii. Hot Market
      iv. Featured Brand
      v. Player

4. **PO Fields**

   a. Distribution Type
      i. Single Store
         1. This is only set for orders that are already allocated to single location
      ii. Multi Store
         1. DO NOT USE
      iii. Blanket Bulk

            1. This should be set for prebooks & any other POs that do not need immediate allocation
        iv. Bulk for Immediate Allocation
            1. This is set for orders that need to be allocated immediately
    b. Allocation Requirement
        i. Full Allocation
            1. Allocation will allocate all units
        ii. Allow Drawdown
            1. Order will be decremented and allocated during the ship to cancel date window
        iii. Manual Allocation
            1. If you are planning writing order via POG
    c. Ship Date
        i. Important for the grouping. Orders will be grouped
        ii. Looking Monday-Sunday,
            1. M,T,W PO's it will take the latest ship date and group together
    d. PO Allocation Lead Time
        i. This will override the vendor record field if you need a PO to allocate sooner
    e. Minimum Dollar Amount
        i. This will override the vendor record field
    f. POA Error
    g. Bulk Allocation Method
        i. Campus Plus OTB
            1. This is the default
        ii. Top Stores
        iii. Nike NBA Doors Only
        iv. Manual Allocation Required
            1. Use this when you have an order that you need to POG to specific stores rather than letting POA allocate
    h. Vendor PO Export Status
        i. Approved
        ii. Pending Vendor Approval
    i. PO Types
        i. What makes an order a blanket bulk is the Distribution Type not the PO Type
            1. First Order
            2. Prebook
            3. Reorder
            4. Replenishment (future scope)

            5. Closeout-Manual Discount
            6. Closeout20- Closeout60
            7. Hot Market (future scope)

5. Reorder Request Fields
    a. Approved Order Quantity
        i. type in the amount approved for the order
    b. Adjust the ship and cancel date for the order
    c. Vendor PO Export Status
        i. Approved- will create the bulk and then create the store breakout Pos on the next date the vendor is set to allocate.
        ii. Pending Vendor Approval- will create a bulk that will sit for buyer to send to vendor to confirm available quantity and ship date.
            1. Once approved buyer navigates back to reorder request and flip to approved.
    d. Silhouette Size Scale Total
        i. must be 100% if not, navigate to the silhouette and change the CPSS.
    e. Order Status
        i. change to create order

PO Grouping

1. Standard
    a. PO Type
    b. Vendor
    c. Assigned Buyer (SAR Buyer for Hardlines/Accessories)
    d. Ship Date
    e. Hot Market
2. Stndrd Plus Dec Proc and Team
3. Stndrd Plus Dec Process
4. Stndrd Plus Fullfillment Loc
5. Stndrd Plus Grphc Emb Code
6. Stndrd Plus League
7. Stndrd Plus Mrktng Event
8. Stndrd Plus Silo
9. Style

Immediate Allocation

How does it work?

1. This process is used when a bulk PO is created with a ship date within the vendors allocation lead time window. Using the Distribution Type of Bulk For Immediate Allocation along with the Vendor PO Export Status set to Pending Vendor Approval will hold the orders back from being allocated. This allows the buyer time to confirm the availability of the item with the vendor before allocations are created. Once the vendor has confirmed & the bulk is ready to be allocated the buyer can set the Vendor PO Export Status to Approved on the PO. The order will then be allocated during the next PO Allocation day that is set for that Vendor.
2. The Vendor PO Export Status field can be found on the Vendor record, Reorder Request & PO. See relevant field sections for more details.
3. When a bulk order is created with a ship date within the vendors allocation lead time window it will auto set the Distribution Type to Bulk For Immediate Allocation

Immediate Allocation Tool – coming soon

Procedure