

The background is a solid yellow color with a repeating pattern of small, white, line-art icons. These icons represent various business and technology concepts, such as a thumbs up, a person silhouette, a target, a lightbulb, a bar chart, a pie chart, a calculator, a document with a pencil, a smartphone, a gear, and a dollar sign.

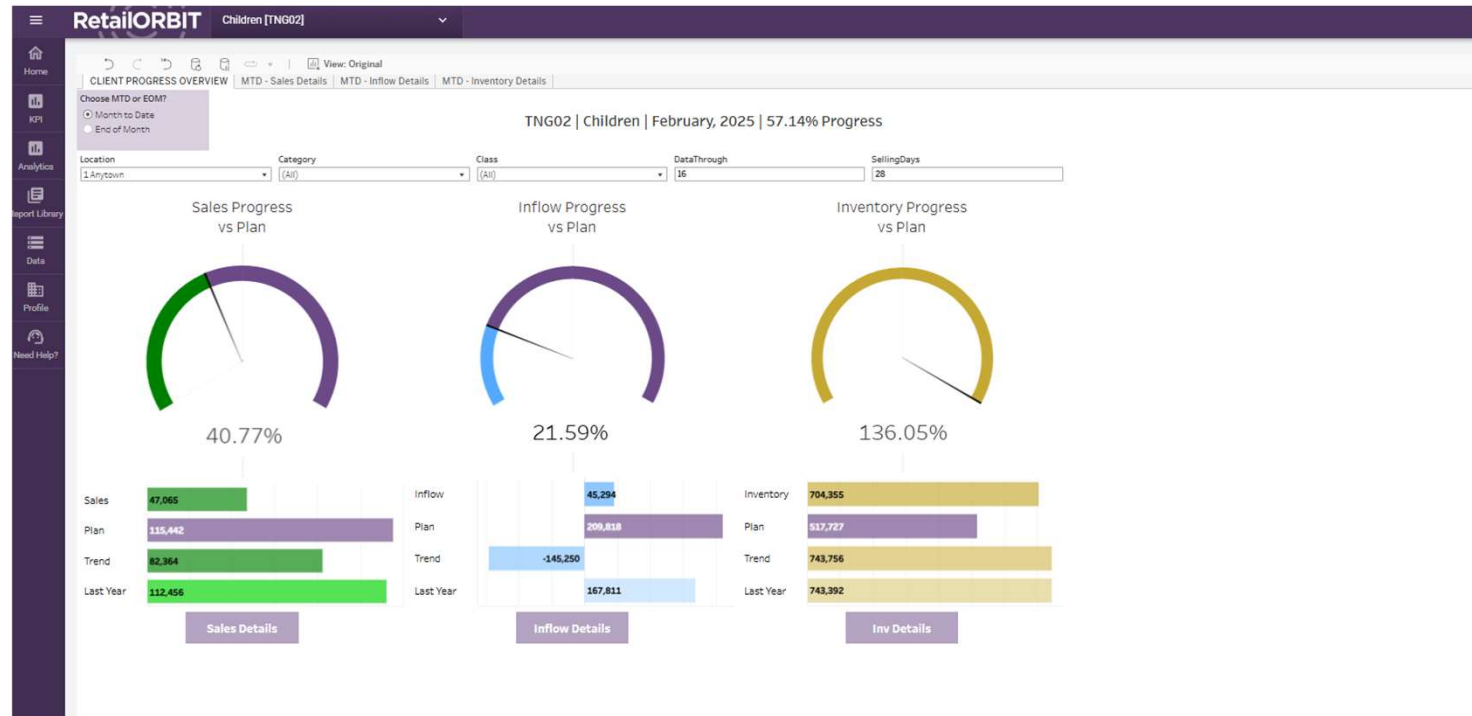
THE PROCESS

Retail Orbit Overview

Navigating the site

Getting started with Retail ORBIT

- www.retailorbit.com
- Retail Orbit is your one-stop-shop for reporting and client needs.
- It's a cloud based system that can be accessed anywhere with internet service.
- Explore and test out reports- you won't break it!



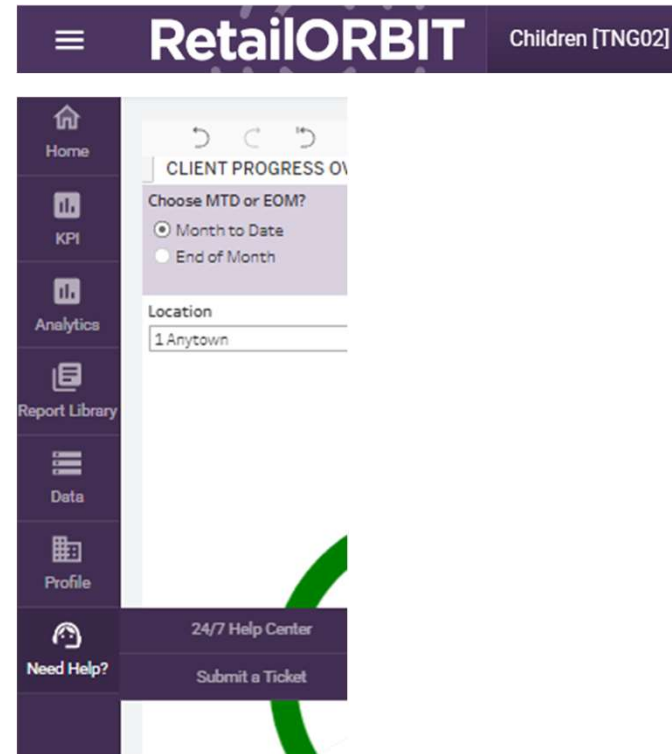
Finding support

24/7 Help- click here to

- Access knowledge base
- Open a support ticket in Zendesk
- Check support ticket status

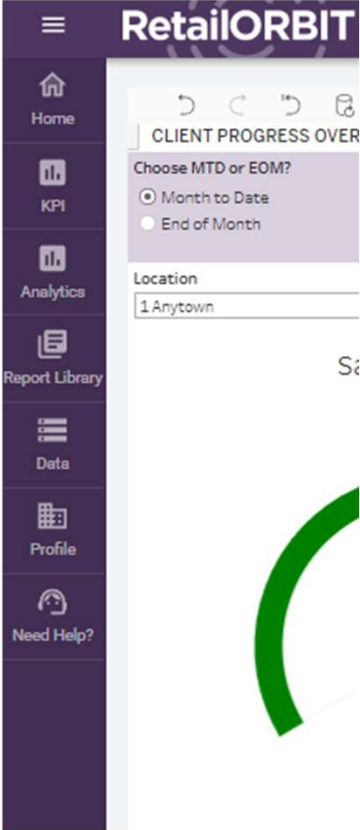
Submit a Ticket – click here to

- Open a support ticket in Zendesk
- Check support ticket status



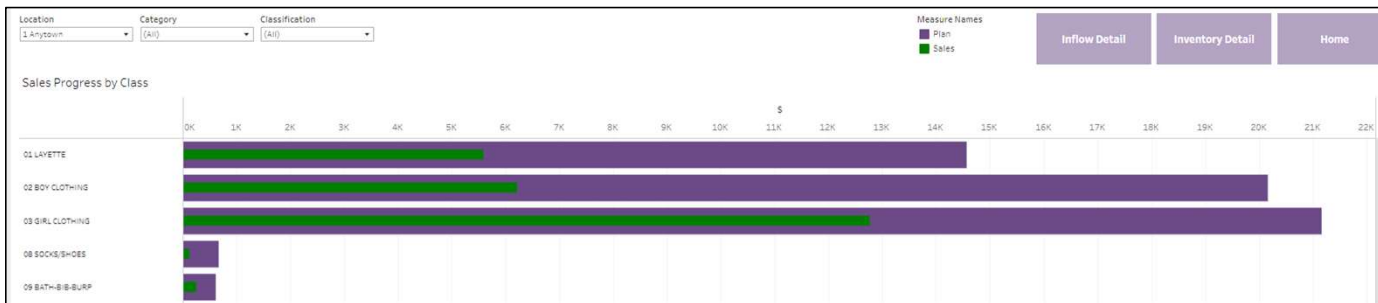
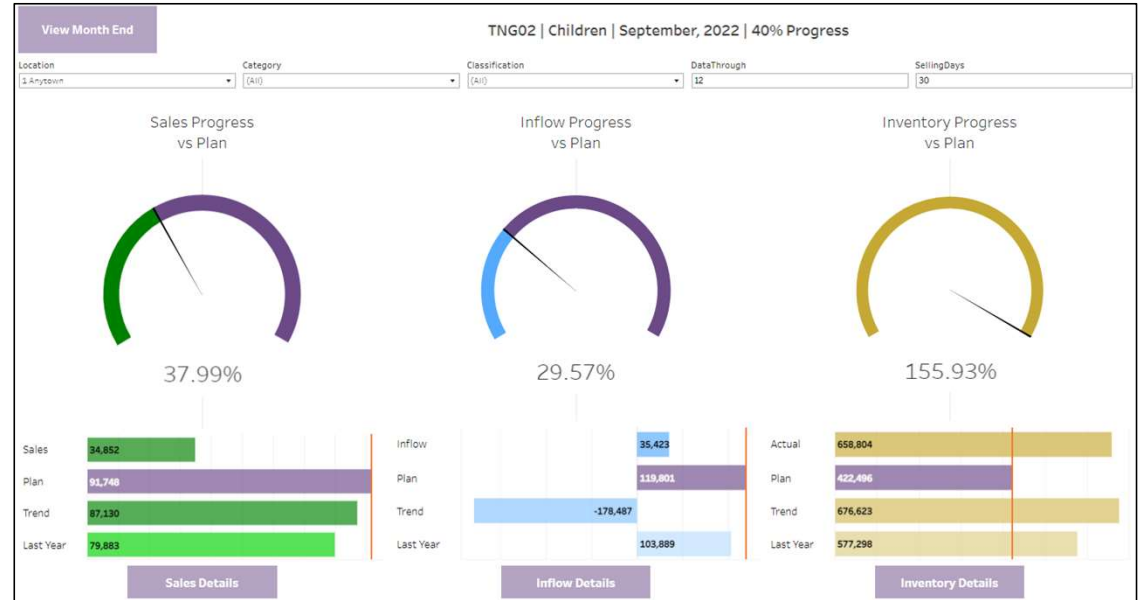
Finding reports & data

- Dashboard / Client Progress Overview
- KPI Analysis
- Analytics Reports
- Report Library
- Data exports & files
- Client Profile



The Dashboard

Client Progress Overview



Filtering the Dashboard

View Month End

TNG02 | Children | September, 2022 | 40% Progress

Location: 1 Anytown **Select one, some or all Locations**

Category: (All) **Select one, some or all Categories**

Classification: (All) **Select one, some or all Classes**

DataThrough: 12

SellingDays: 30 **Adjust the number of selling days in the month**

Inventory Progress vs Plan

37.99%

Inventory Progress vs Plan

155.93%

Sales Details

Sales	34,852
Plan	91,748
Trend	87,130
Last Year	79,883

Inflow Details

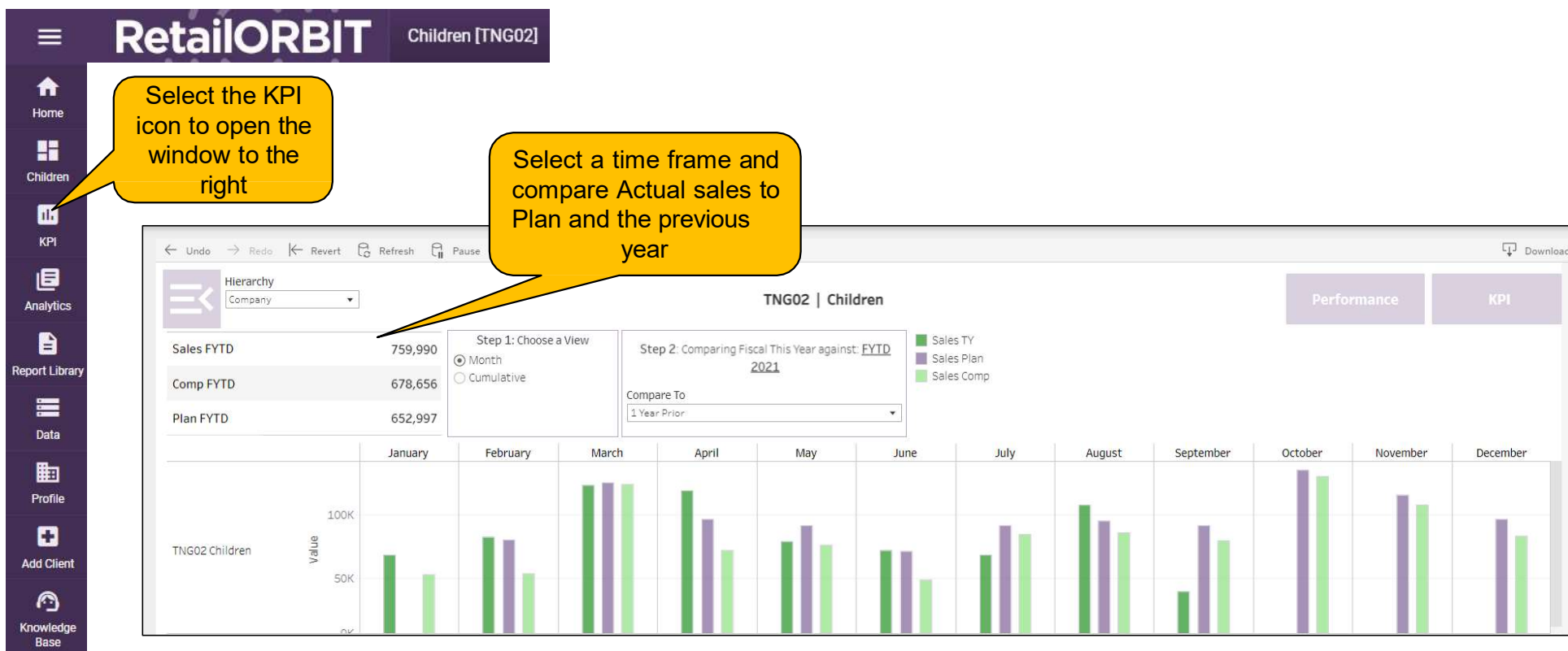
Inflow	35,423
Plan	119,801
Trend	-178,487
Last Year	103,889

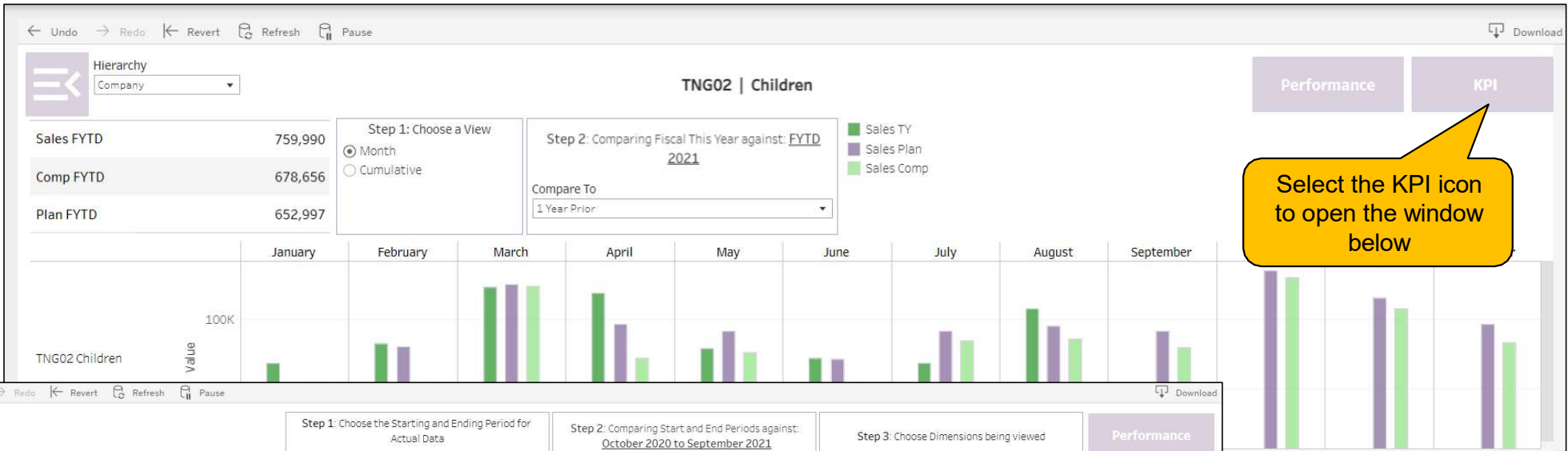
Inventory Details

Actual	658,804
Plan	422,496
Trend	676,623
Last Year	577,298

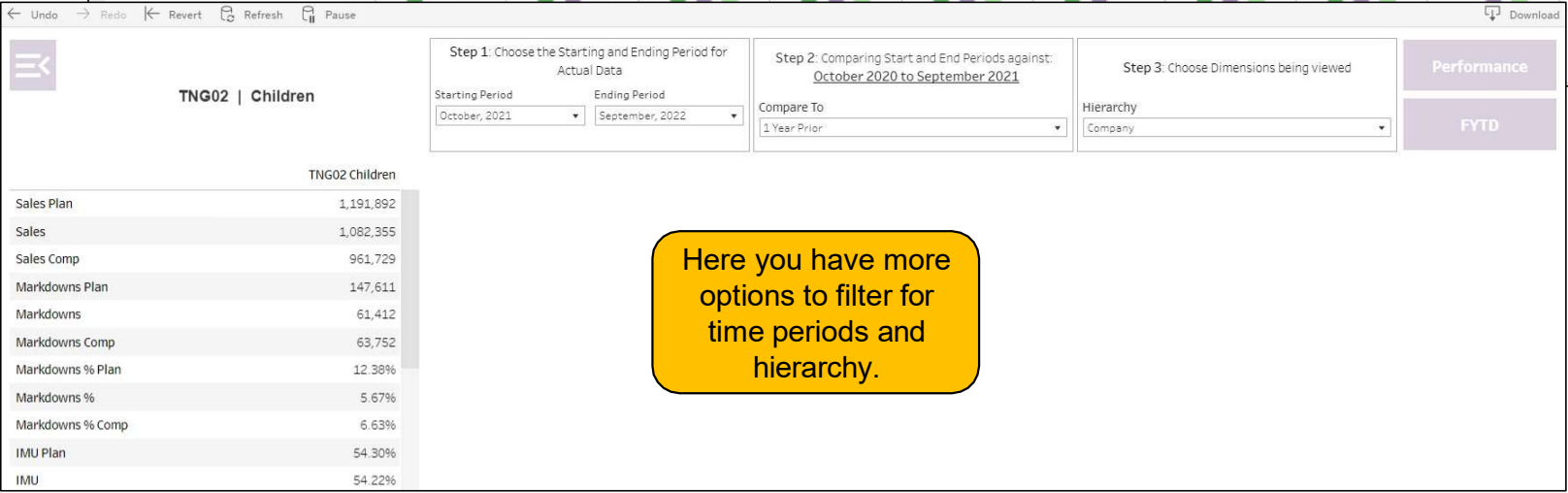


KPI Dashboard





Select the KPI icon to open the window below





Here you have more options to filter for time periods and hierarchy.

KPI Dashboard



Analytics

Sections are organized by functionality, and most reports can be filtered

Please select a date  September 2022 

ANALYTICS	PROGRESS	TAKE ACTION	MY EXPORT
Global Analytics.	Progress Report.	Open to Buy Recap (Month End).	MTD Export
Class Performance.		Open To Buy Recap (Month to Date).	EOM Export
Inventory Performance.		Inventory Action.	Data Validation
Buyer Performance.		Inventory Variance.	Plan Change Over Time



Report Library

The plans and reports shown here automatically update each month as well as any new custom reports you save

My custom reports, views and filter sets

Sharing:
 Report Type:
 Period:

[+ Create a New Filter Set](#)

Name	Report Type	Period	Hierarchy	Span	Retail or Cost	Data Through	Last Update	Action
Default All	OTB Recap EOM	<input type="text" value="Sep 2022"/>	<input type="text" value="By Class"/>	<input type="text" value="Sep"/> - <input type="text" value="Aug"/>	<input type="text" value="Retail"/>	-	Sep 13 00:43	Generate PDF Web View
Default All	OTB Recap MTD	<input type="text" value="Sep 2022"/>	<input type="text" value="By Class"/>	<input type="text" value="Sep"/> - <input type="text" value="Aug"/>	<input type="text" value="Retail"/>	12 of 30 days: 40%	Sep 13 00:43	Generate PDF Web View
Default All	Global Analytics	<input type="text" value="Sep 2022"/>	<input type="text" value="By Class"/>	<input type="text" value="Sep"/> - <input type="text" value="Dec"/>	<input type="text" value="Retail"/>	-	Sep 13 00:43	Generate PDF Web View
Default All	Inventory Action	<input type="text" value="Sep 2022"/>	<input type="text" value="By Class"/>	<input type="text" value="Sep"/>	<input type="text" value="Retail"/>	12 of 30 days: 40%	Sep 13 00:43	Generate PDF Web View
Default All	Merchandise Plan	<input type="text" value="Sep 2022"/>	<input type="text" value="By Class"/>	-		-	Sep 13 00:43	Generate PDF Web View
Default All	Plan on Demand	<input type="text" value="Sep 2022"/>	<input type="text" value="By Class"/>	-		12 of 30 days: 40%	Sep 13 00:43	Generate PDF Web View



Report Library

Create, modify & save custom reports

+ Create a New Filter Set

My custom reports, views and filter sets

Sharing: All | Report Type: All | Period: All

Select Cost or Retail

Select the month of the report

Select the report hierarchy by class, by location, etc.

Select the start and end date of the report

For MTD reports, shows data thru this date

Date of last data update

Select to view on-screen or generate a PDF

Name	Report Type	Period	Hierarchy	Span	Retail or Cost	Data Through	Last Update	Action
Default All	OTB Recap EOM	Sep 2022	By Class	Sep - Aug	Retail	-	Sep 13 00:43	Generate PDF Web View
Default All	OTB Recap MTD	Sep 2022	By Class	Sep - Aug	Retail	12 of 30 days: 40%	Sep 13 00:43	Generate PDF Web View
Default All	OTB Recap MTD	Sep 2022	By Class	Sep - Dec	Retail	-	Sep 13 00:43	Generate PDF Web View
Default All	Merchandise Plan		Class		Retail		Sep 13 00:43	Generate PDF Web View
Default All	Plan on Demand		Class		Retail	12 of 30 days: 40%	Sep 13 00:43	Generate PDF Web View

Generating Reports

My custom reports, views and filter sets

Sharing:
 Report Type:
 Period:

Name	Report Type	Period	Hierarchy	Span	Retail or Cost	Data Through	Last Update	Action
Default All	OTB Recap EOM	Sep 2022	By Class	Sep - Aug	Retail	-	Sep 13 00:43	Generate PDF Web View
Default All	OTB Recap MTD	Sep 2022	By Class	Sep - Aug	Retail	12 of 30 days: 40%	Sep 13 00:43	Generate PDF Web View
Default All	Global Analytics	Sep 2022	By Class	Sep - Dec	Retail	-	Sep 13 00:43	Generate PDF Web View
Default All	Inventory Action	Sep 2022	By Class	Sep	Retail	12 of 30 day		Generate PDF Web View
Default All	Merchandise Plan	Sep 2022	By Class	-		-		Generate PDF Web View
Default All	Plan on Demand	Sep 2022	By Class	-		12 of 30 days: 40%	Sep 13 00:43	Generate PDF Web View

Select here to view live Web View

Select here to generate a PDF



Generating Reports

1. After selecting the Generate PDF icon, you will get the OK message above when successfully generated



Success

OK

2. Then select the OK button

3. Then select the download arrow to generate the report

4. And here is the PDF Report

Children2022-09-1....pdf

PDF & Custom View Configuration

Here are the filter and sort options for a custom Merch Plan

PDF and Custom View Configuration

Filter Set Name Input a unique name for the report

Report Merchandise Plan

Report Period Select the Report Period

Sort By Select the default sorts or custom sorts
 Default Custom

Select one, some or all Locations

Select one, some or all Classes

Select one, some or all Categories

Save the custom report

PDF & Custom View Configuration

The filter and sort options will change per the report selected.

PDF and Custom View Configuration

Filter Set Name:

Report:

Report Period:

Sort By: Default Custom

Class:

Locations:

Classes:

Categories:

These are the filter options for to customize a Merchandise Plan

PDF and Custom View Configuration

Filter Set Name:

Report:

Report Period:

Time Range:

Start Period:

End Period:

Table Data:

Sort By: Default Custom

Class:

Locations:

Classes:

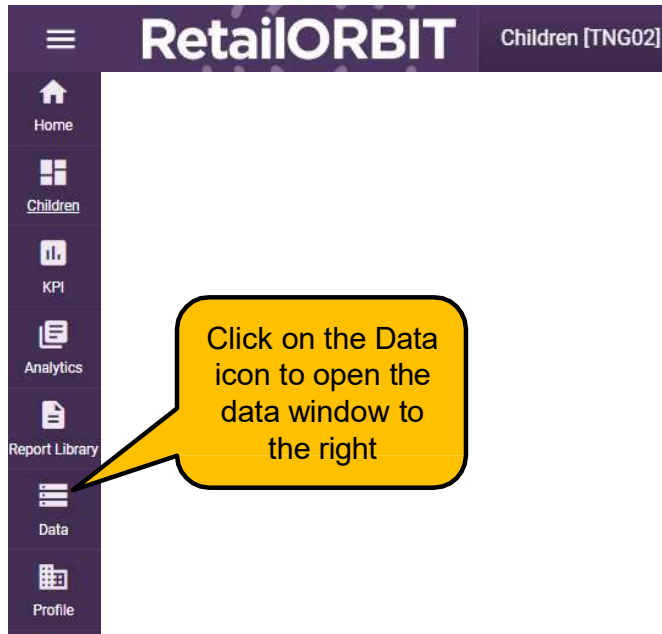
Categories:

Include Child Class:

Select:

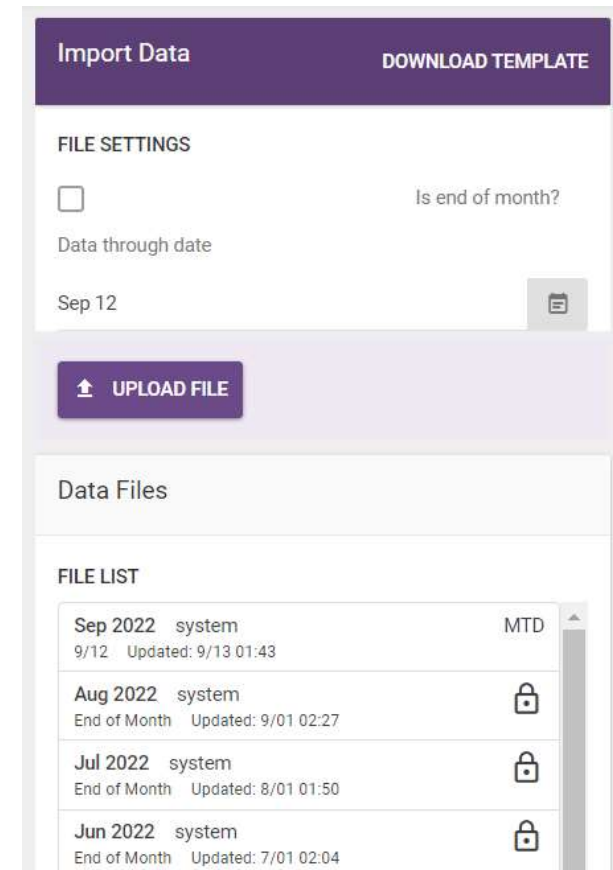
The filter options expand to customize an OTB Recap report.

The data menu



This section can be used to upload data manually for non shuttle clients.

You can also check when data was last imported and specifically what numbers were imported.



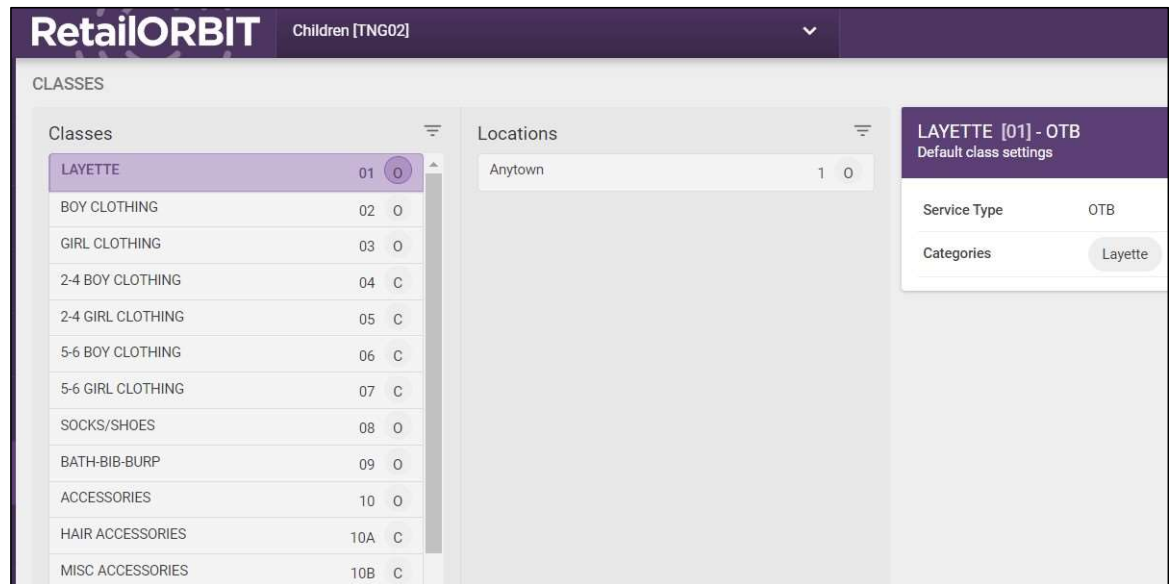
Client Profile



RetailORBIT Children [TNG02]

- Home
- Children
- KPI
- Analytics
- Report Library
- Data
- Profile**

Click on the Profile icon to open the window to the right



RetailORBIT Children [TNG02]

CLASSES

Classes		
LAYETTE	01	O
BOY CLOTHING	02	O
GIRL CLOTHING	03	O
2-4 BOY CLOTHING	04	C
2-4 GIRL CLOTHING	05	C
5-6 BOY CLOTHING	06	C
5-6 GIRL CLOTHING	07	C
SOCKS/SHOES	08	O
BATH-BIB-BURP	09	O
ACCESSORIES	10	O
HAIR ACCESSORIES	10A	C
MISC ACCESSORIES	10B	C

Locations		
Anytown	1	O

LAYETTE [01] - OTB
Default class settings

Service Type: OTB

Categories: Layette

This section can be used to see the customer profile with class structure and locations.

