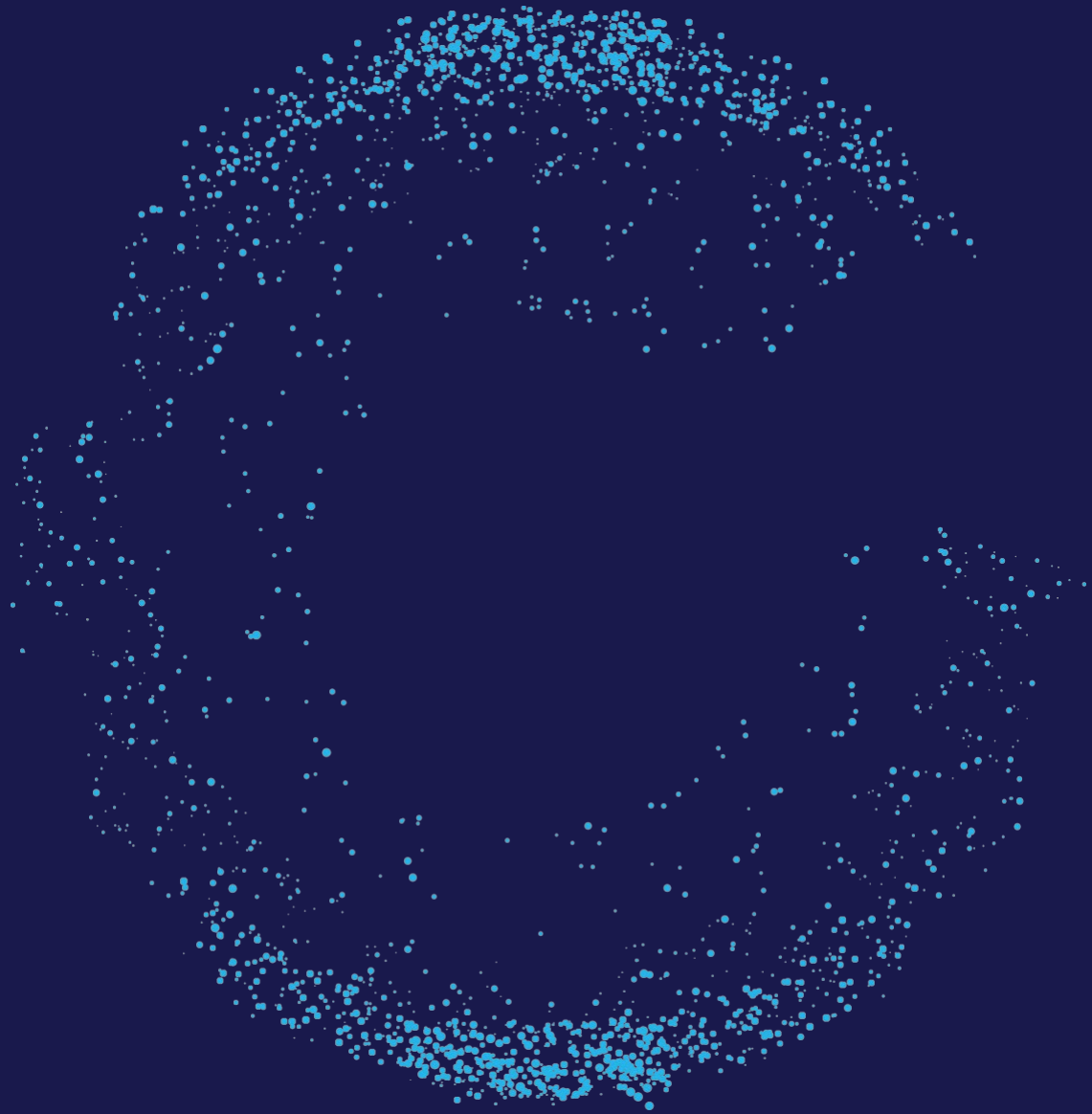


Education Services

Course Catalog



Retail Planning – Platform

Revision Date: August 2026

About This Catalog

This catalog is your essential guide to training opportunities for various retail planning solutions that run on the Blue Yonder Platform. Whether you are a new user or an experienced professional, the courses outlined in this catalog help you gain the knowledge and skills required for the successful adoption and effective use of the retail planning solutions.

The catalog provides a structured overview of available courses and their learning objectives, audience, and duration. For assistance or guidance in selecting the required courses, you can contact your Blue Yonder Customer Experience or Education Services team.

Contents

About This Catalog	2
About Blue Yonder Education Services	3
Blue Yonder Education Courses	3
Retail Planning – Platform Catalog — Course Overviews	4
Retail Planning – Platform Course Details	6
4842: Replenishment Overview	6
4846: Supplier Ordering Overview	8
4850: Allocation Overview	10
4855: Merchandise Financial Planning Overview	12
4791: Blue Yonder Platform – Planning Technical	14

About Blue Yonder Education Services

Blue Yonder Education Services seeks to improve supply chain excellence by offering innovative, tailored, and cost-effective training solutions. It focuses on transforming training with adaptable, high-quality programs that help you achieve your business goals, deliver industry-leading performance, and drive economic growth. Blue Yonder Education Services' core offerings include:

- Product courses delivered in person or virtually, as instructor-led training
- Public schedule and private course events
- Applied coaching and mentoring services
- Digital subscriptions and online courses
- Certifications
- Skill gap analysis surveys and training need assessments
- Organizational change and end-user training advisory and professional services

Blue Yonder Education Courses

Designed to facilitate effective adoption and utilization of its software solutions, Blue Yonder training courses provide a structured, expert-guided learning experience.

Features and Benefits

-  Offer in-person or live virtual classroom training, delivered by a qualified Blue Yonder instructor, with standard or customized courses and hands-on exercises
-  Provide comprehensive training on specific Blue Yonder solutions and related business processes
-  Ensure learner engagement throughout the training program
-  Award learners with badges and certification, when applicable



Retail Planning – Platform Catalog— Course Overviews

Blue Yonder’s Cognitive Retail Planning catalog offers hands-on instructor-led courses aimed at establishing foundational conceptual knowledge and software navigation skills for feature sets available in the retail planning space, including Allocation and Replenishment, and Merchandise Financial Planning. These courses cover key concepts and vocabulary supplemented by hands-on lab exercises that simulate common workflows and procedures.

Overview courses are half-day sessions designed to be offered at the very start of a project, to help kick off the project and educate key stakeholders in the organization about the software to be implemented. Overview courses are not hands-on, but do feature live software demos and a discussion of key features and benefits. They can be offered to a wider audience than the project team, including associates responsible for customer systems that may feed information to, or receive recommendations from, Blue Yonder.

Course Name	Learning Objectives	Audience	Duration
4842: Replenishment Overview	After completing this course, learners will be able to: - Describe Allocation and Replenishment and how these activities fit into a synchronized retail planning solution. - Describe the key features and benefits of the replenishment functionality in Allocation and Replenishment. - Describe key navigational features of the Blue Yonder Platform. - Describe how the planner’s dashboard can help a planner proactively assess inventory positions and issues. - Explain how to review details of store and DC insights.	Planners, Superusers, customer Associates needing to be informed	0.5 days
4846: Supplier Ordering Overview	After completing this course, learners will be able to: - Describe Allocation and Replenishment and how these activities fit into the synchronized planning solution known as Cognitive Planning for Retail. - Describe the key features and benefits of the supplier ordering functionality in Allocation and Replenishment. - Describe key navigational features of the Blue Yonder Platform. - Describe how to review and approve a due order in the Blue Yonder Platform.	Planners, Superusers, customer Associates needing to be informed	0.5 days

4850: Allocation Overview	After completing this course, learners will be able to: • Describe Allocation and Replenishment and how these activities fit into a synchronized planning solution. • Describe the key features and benefits of the allocation functionality in Allocation and Replenishment. • Describe key navigational features of the Blue Yonder Platform • Describe the basic steps a planner will perform to set up and run an Allocation in the Planning Space.	Planners, Superusers, customer Associates needing to be informed	0.5 days
4855: Merchandise Financial Planning Overview	After completing this course, learners will be able to: • Explain the Merchandise Financial Planning lifecycle and highlight its key differentiators. • Describe key navigational features of the Blue Yonder Platform. • Describe how a planner can review a basic product or location plan in the MFP Planning Space. • Identify the various types of planning processes handled in MFP.	Planners, Superusers, customer Associates needing to be informed	0.5 days

Retail Planning – Platform Course Details

4842: Replenishment Overview

Course Objectives

After completing this course, learners will be able to:

- Describe Allocation and Replenishment and how these activities fit into a synchronized end-to-end retail planning environment.
- Describe the key features and benefits of the replenishment functionality in Allocation and Replenishment.
- Describe key navigational features of the Blue Yonder Platform.
- Describe how the planner's dashboard can help a planner proactively assess inventory positions and issues.
- Explain how to review details of store and DC insights.

Audience

Planners and Superusers

Prerequisites

No prerequisites are required for this course.

Duration

0.5 days (in person or virtual)

Training Level

Beginners

Lesson Name	Learning Objectives	Duration
Allocation and Replenishment—an Overview	After completing this lesson, learners will be able to: • Describe Allocation and Replenishment and how these activities fit into the synchronized planning solution known as Cognitive Planning for Retail. • Describe the difference between Allocation and Replenishment, and how they work together to support the end-to-end lifecycle of a product. • Describe where Supplier Ordering fits into the overall retail planning space, and how it is used. • Describe how features such as Scenarios and Process Orchestration support the daily responsibilities of planners in the Cognitive space.	1 hour
Replenishment— a Closer Look	After completing this lesson, learners will be able to: • Explain where Replenishment fits in the supply chain planning flow. • Describe the benefits of time-phased replenishment planning. • Explain time-phased planning in a multi-echelon network. • List some of the key capabilities of Replenishment in the Blue Yonder Platform.	1 hour

Lesson Name	Learning Objectives	Duration
Basic Navigation in the Blue Yonder Platform	After completing this lesson, learners will be able to describe how to use basic navigation features of the Blue Yonder Platform.	1 hour
View a Replenishment Plan	After completing this lesson, learners will be able to: • Describe how the Planner's Dashboard can help a planner proactively assess inventory positions and issues. • Explain how to review details of store and DC insights. • Explain how to review the replenishment plan for individual SKUs in the Plan Analysis view. • Describe a sample planner workflow.	1 hour

4846: Supplier Ordering Overview

Course Objectives

After completing this course, learners will be able to:

- Describe Allocation and Replenishment and how these activities fit into a synchronized end-to-end retail planning environment.
- Describe the key features and benefits of the supplier ordering functionality in Allocation and Replenishment.
- Describe key navigational features of the Blue Yonder Platform.
- Describe how to review and approve a due order in the Blue Yonder Platform.

Audience

Planners and Superusers

Prerequisites

No prerequisites are required for this course.

Duration

0.5 days (in person or virtual)

Training Level

Beginners

Lesson Name	Learning Objectives	Duration
Allocation and Replenishment – an Overview	After completing this lesson, learners will be able to: • Describe Allocation and Replenishment and how these activities fit into the synchronized planning solution known as Cognitive Planning for Retail. • Describe the difference between Allocation and Replenishment, and how they work together to support the end-to-end lifecycle of a product. • Describe where Supplier Ordering fits into the overall retail planning space, and how it is used. • Describe how features such as Scenarios and Process Orchestration support the daily responsibilities of planners in the Blue Yonder Platform.	1 hour
Supplier Ordering— a Closer Look	After completing this lesson, learners will be able to: • Explain how planning activities are performed in a multi echelon network, and where Supplier Ordering fits in. • Identify the various challenges that a buyer might face when placing vendor orders and how the Supplier Ordering service helps address those challenges. • Describe key features of the Supplier Ordering service.	1 hour
Basic Navigation in the Blue Yonder Platform	After completing this lesson, learners will be able to describe how to use basic navigation features of the Blue Yonder Platform.	1 hour

Lesson Name	Learning Objectives	Duration
Review and Approve a Due Order	After completing this lesson, learners will be able to: • Identify orders on the planner's Dashboard that require review and approval. • Open the Order Details page and review a suggested order, including all suggested order quantities. • Modify suggested order quantities. • Approve a due order.	1 hour

4850: Allocation Overview

Course Objectives

After completing this course, learners will be able to:

- Describe Allocation and Replenishment and how these activities fit into a synchronized end-to-end retail planning environment.
- Describe the key features and benefits of the allocation functionality in Allocation and Replenishment.
- Describe key navigational features of the Blue Yonder Platform
- Describe the basic steps a planner will perform to set up and run an Allocation in the Planning Space.

Audience

Planners and Superusers

Prerequisites

No prerequisites are required for this course.

Duration

0.5 days (in person or virtual)

Training Level

Beginners

Lesson Name	Learning Objectives	Duration
Allocation and Replenishment—an Overview	After completing this lesson, learners will be able to: • Describe Allocation and Replenishment and how these activities fit into the synchronized planning solution known as Cognitive Planning for Retail. • Describe the difference between Allocation and Replenishment, and how they work together to support the end-to-end lifecycle of a product. • Describe where Supplier Ordering fits into the overall retail planning space, and how it is used. • Describe how features such as Scenarios and Process Orchestration support the daily responsibilities of planners in the Cognitive space.	1 hour
Allocation—a Closer Look	After completing this lesson, learners will be able to: • Describe the configuration steps required for Allocation. • Describe the basic steps a planner will take to set up and run an allocation. • Discuss the key features of Allocation.	1 hour

Lesson Name	Learning Objectives	Duration
Basic Navigation in the Blue Yonder Platform	After completing this lesson, learners will be able to describe how to use basic navigation features of the Blue Yonder Platform.	1 hour
Set Up and Run an Allocation—an Overview	After completing this lesson, learners will be able to describe how to: • Locate a list of Suggested Allocations. • Navigate through the basic Allocation workflow pages. • Describe the basic steps a planner might take to set up and run an Allocation.	1 hour

4855: Merchandise Financial Planning Overview

Course Objectives

After completing this course, learners will be able to:

- Explain Merchandise Financial Planning lifecycle and highlight its key differentiators.
- Describe key navigational features of the Blue Yonder Platform.
- Describe how a planner can review a basic financial plan in the Planning Space page.
- Identify the various types of planning processes.

Audience

Planners and Superusers

Prerequisites

No prerequisites are required for this course.

Duration

0.5 days (in person or virtual)

Training Level

Beginners

Lesson Name	Learning Objectives	Duration
Merchandise Financial Planning—an Overview	After completing this lesson, learners will be able to: • Explain how AI/ML forecast driven sales plan improve financial planning. • List the key stages of the merchandise planning cycle. • Explain the key differentiators of Merchandise Financial Planning. • Explain the purpose and benefits of process orchestration. • Describe different types of scenario planning in Merchandise Financial Planning.	2 hours
Basic Navigation in the Blue Yonder Platform	After completing this lesson, learners will be able to describe how to use basic navigation features of the Blue Yonder Platform.	1 hour

Types of Planning Processes	After completing this lesson, learners will be able to: • Identify the various types of planning processes. • Explain the role of various planning process in a planning cycle.	1 hour
------------------------------------	---	---------------

4791: Blue Yonder Platform – Planning Technical

Course Objectives

After completing this course, learners will be able to:

- Explain the use of core applications of Blue Yonder Platform.
- Perform the key tasks in the following core applications of Blue Yonder Platform, including:
 - Manage data settings using Data Cloud Configuration.
 - Track data movement using End to End Data Traceability.
 - Configure role-based access control using Identity & Access.
 - Configure dimensions, nodes, and measure groups using Semantic Network Architect.
 - Create a new workspace using Business Data Management.
 - Create custom collection using Data as a Service.
 - Develop reports using Analytics.

Audience

Blue Yonder Platform project team, Superusers, and configuration specialists

Prerequisite

This course has no prerequisite, but it is recommended that participants go through one of the Foundation courses before attending this class.

Duration

3 days (in person or virtual)

Training Level

Intermediate

Lesson Name	Learning Objectives	Duration
01: Getting Started – Blue Yonder Platform Introduction	After completing this lesson, learners will be able to: • Describe the capabilities of Blue Yonder Platform. • Log on to the Blue Yonder Portal. • Generate a uniform resource identifier for Azure Storage Access using API Catalog. • Access Azure Storage Explorer and establish a connection to Azure Blob Storage.	3 hours
02: Data Cloud Configuration	After completing this lesson, learners will be able to: • Create entities and add attributes. • Create attributes. • Create a collection with an entity. • Create a physical layer. • Create a data validation rule. • Review a data function. • Create ingestion settings for a new collection.	2 hours

03: Leveraging Ingestion Features and Traceability	After completing this lesson, learners will be able to: • Configure settings for data ingestion. • Ingest data using the Ingress option. • View the ingestion status in End to End Data Traceability. • Ingest data using the BatchIngress option and a trigger file. • Review payload status and your ingestion exceptions using End to End Data Traceability.	3 hours
04: The Semantic Network Architect	After completing this lesson, learners will be able to: • Create a dimension. • Add attributes and hierarchies to a dimension. • Explore Actors and Procedures. • Describe how procedures can be configured to run in a sequence.	2 hours
05: Navigation and Working with Process Orchestration	After completing this lesson, learners will be able to: • Explain the purpose of creating a planning process and how it supports orchestration. • Create and edit a child process in the system. • Create a view group and a view in the Observability UI. • Review a process summary using the Process Orchestration Service.	2 hours
06: Configuring the Planning Space as a Superuser	After completing this lesson, learners will be able to: • Create a new card in Planning space. • Add a new card from the card gallery in Planning space.	2 hours
07: Identity & Access	After completing this lesson, learners will be able to: • Explain the role of Identity & Access in Blue Yonder Platform. • Navigate to Identity & Access. • Create a new role. • Add policies to a role. • Assign roles to a user.	2 hours
08: Data as a Service	After completing this lesson, learners will be able to: • Create a custom collection and add entities to it. • Export collection data and configuration files. • Apply the Export Now feature to generate and download configuration files.	3 hours

09: Analytics	After completing this lesson, learners will be able to: • Create and edit a report using Analytics. • Configure a report using the report workspace. • Format and customize a report. • Publish a report. • Commit a report. • View a report in Planning space.	3 hours
10: Audit Logs	After completing this lesson, learners will be able to: • Create a report. • Adjust and review the Audit Logs.	2 hours

Hands-on Exercises: This course contains hands-on exercises for practicing the tasks covered in the lessons.

Note: The hands-on exercises will be practiced during the training sessions with the help of the instructor.

