

Oracle® Retail Store Inventory Management
User Guide Addendum
Release 12.0.10IN

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Preface

This document details the enhancements and modification made in Oracle Retail Store Management System (ORSIM) to support Multiple MRP (MMRP) and configurable taxation functionality. The new functionalities are India specific business requirement. These modifications are made in SIM 12.0.10IN release.

Audience

This document is intended for business users to understand the new functionality. The document is also intended for technical developers to understand what the solution offers to the users.

As this document only explains the changes made to the SIM application, it is suggested that you refer the *SIM User Guide* for functional and procedural information.

Related Documents

For more information, see the following documents in the Oracle Retail Store Inventory Management Release 12.0.10IN documentation set:

- *Oracle Retail Store Inventory Management Installation Guide*
- *Oracle Retail Store Inventory Management Release Notes*
- *Oracle Retail Store Inventory Management Online Help*
- *Oracle Retail Store Inventory Management Operations Guide*
- *Oracle Retail Store Inventory Management Data Model*

See also:

- Oracle Retail Merchandising System 12.0.10IN documentation
- Oracle Retail Integration Bus 12.0.9IN documentation
- Oracle Retail Price Management 12.0.10IN documentation
- Oracle Retail Invoice Matching 12.0.8.4 IN documentation
- Oracle Retail Point-of-Service 12.0.9IN documentation
- Oracle Retail Back Office 12.0.9IN documentation
- Oracle Retail Central Office 12.0.9IN documentation
- Oracle Retail Strategic Store Solutions 12.0.9IN documentation
- Oracle Retail Security Manager 12.0.4 documentation

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:
<https://metalink.oracle.com>

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Review Patch Documentation

If you are installing the application for the first time, you install either a base release (for example, 12.0) or a later patch release (for example, 12.0.11). If you are installing a software version other than the base release, be sure to read the documentation for each patch release (since the base release) before you begin installation. Patch documentation can contain critical information related to the base release and code changes that have been made since the base release.

Oracle Retail Documentation on the Oracle Technology Network

In addition to being packaged with each product release (on the base or patch level), all Oracle Retail documentation is available on the following Web site:

http://www.oracle.com/technology/documentation/oracle_retail.html

Documentation should be available on this Web site within a month after a product release. Note that documentation is always available with the packaged code on the release date.

Conventions

Navigate: This is a navigate statement. It tells you how to get to the start of the procedure and ends with a screen shot of the starting point and the statement “the Window Name window opens.”

Note: This is a note. It is used to call out information that is important, but not necessarily part of the procedure.

This is a code sample
It is used to display examples of code

A hyperlink appears like this.

Disclaimer

The User Guide addendum has been documented based on the current understanding of the requirements. These requirements may not be final and are subject to change based on review during subsequent stages by various stakeholders during the review of functional specifications.

Overview

Oracle Retail **Store Inventory Management** (SIM) allows store personnel to quickly and easily perform an array of in-store operations to receive merchandise, manage physical inventories, conduct stock counts, order stock, or transfer stock.

With India Localization release, taxes can be calculated for new POs, Transfers (outbound only) and RTVs received or dispatched in SIM on the basis of Supplier information set up in RMS.

Some of the changes in the India Localization SIM are:

- Tax Set Up Data (Tax Regions and Taxpayer Type) from RMS is downloaded to SIM. This information is used to enter valid Tax Region and Taxpayer Type information of the supplier on various screens of Shipping and Receiving module.
- SIM captures new/existing MRP during the DSD receipt process for new as well as RMS created Purchase Orders. The receipt message publishes the MRP captured at line item level to RMS. The application also captures MRP during RTV for all return line items. This is interfaced to RMS as part of RTV message. However, RTW will not capture MRP at return line item and will continue to work as base.
- New System Admin Option added to determine whether SIM is enabled for MMRP Localization.
- Multiple Taxes can be calculated in SIM for DSD Receiving, transfer dispatch (Store-to-Store as well as Return to Warehouse), Return to Vendor using an online call to RMS tax calculation function. For dispatch options, SIM displays an error message and stops the user from shipping without tax calculation, if the network access to RMS is unavailable. For receiving options, SIM displays a warning, if the network access to RMS is unavailable. The user is allowed to proceed with the receipt if the warning message is overridden.
- Shipping and Receiving
 - When a PO is being received in SIM, SIM displays the supplier's Tax Region and Taxpayer Type for DSD receipt process, calculates and displays tax components at line and receipt total level. This information is interfaced to RMS as part of the receipt message and printed on DSD reports.
 - Supplier's Tax Region and Taxpayer Type information for PO created in RMS, is defaulted in SIM which is interfaced from RMS. SIM calculates and displays the Tax component at line level and receipt total level. During receipt, the user can edit Supplier's Tax Region and Taxpayer Type, if required. This information is printed on DSD reports and interfaced to RMS as part of receipt message.
 - RTV created in SIM displays vendor's Tax Region and Taxpayer Type. SIM calculates and displays the tax component at line and header level. This information is interfaced to RMS as part of Return-to-Vendor message and printed on RTV report.
 - Vendor's Tax Region and Taxpayer Type are interfaced to SIM from RMS for RTV created in RMS and defaulted on RTV screen which the user can edit. SIM calculates and displays the tax component at line and header level and prints the information and interface to RMS.
 - Tax is calculated for all Return-to-Warehouse (RTW)/Transfer (created in RMS/SIM) dispatches, and printed on RTW /Transfer reports.

Out of Scope

- Tax breakup calculation and display on the User Interface at line item level.
- Warehouse receiving and Store transfer receiving are out of scope and continue to work as base SIM.

All other SIM functionalities not mentioned in this document continue to work as base SIM. Refer to the SIM User Guide for other SIM functionalities.

Enabling India Localization

You can enable the India localization specific functionality in SIM by setting the India localization parameter, **Enable India Localization**, in *RK_CONFIG* table to 'Y'. The value can be either Y or N. When set to Y, all India Localization specific enhancements are enabled; if it is set to N, the new fields added to the existing screens and elements/links to the new screens will be hidden or disabled.

The functionality can be enabled/disabled at the time of SIM install. Once updated to Yes, it should not be modified. However, any change, if need be, can be done only after detailed impact analysis.

To enable the India Localization during SIM installation,

1. From the **Main Menu**, select **Admin**.
2. From the **Admin** menu options, select **System Options**. The various System Options appear.
3. From the **Topic** LOV button, select **Admin**. All the Admin related system options appear.
4. Select **Enable India Localization** and change the **Value** field to **Yes**.
5. Select **Enable Configurable Tax** and change the **Value** field to **Yes** to activate Tax enhancements.

This System Admin Option can be set only during SIM installation. After installation, the India Localization parameter and Configurable Tax is disabled and set to 'System Control' and cannot be updated from SIM User Interface.

Topic	Option	Value
Admin	Allow Non-Range Item	Yes
Admin	Default UOM	Cases
Admin	Disable Pack Size	No
Admin	E-Mail From Name	simAlert@myCompany.com
Admin	E-Mail Role	super user
Admin	E-Mail Server Name	mail
Admin	Enable Configurable Tax	Yes
Admin	Enable India Localization	Yes
Admin	RSL Timeout(seconds)	120

On-Line Mode 40000Store Manager 40000 System Admin HELP

System Admin Options

6. Click **Done**.

System Options

Days to Hold Multiple MRP

The **Days to hold Multiple MRP** parameter defines the number of days the system will keep the inactive multiple MRP in SIM before a batch file purges them.

A new purge batch deletes the inactivated MRP's from the system based on this parameter. Active/Inactive status for MRPs at item-location is maintained in RPM and is imported to SIM as part of price change import for Non-Primary MRPs.

To set the days to hold multiple MRPs:

1. From the **Main Menu**, select **Admin**.
2. From the Admin menu options, select **System Admin**.
3. On the System Admin screen, in **Topic** drop-down list, select **Purge**.
4. Double-click the **Value** field and update the value.

The default value set while installation is set to 100. However, a maximum of 999 values can be set in the Value field.

Topic	Option	Value
Purge	Days to Hold Audit Records	30
Purge	Days to Hold Completed Inventory Adjustments	30
Purge	Days to Hold Completed Purchase Orders	30
Purge	Days to Hold Completed Stock Counts	30
Purge	Days to Hold In Progress Ad Hoc Stock Counts	1
Purge	Days to hold Item Requests	30
Purge	Days to Hold Item Tickets	15
Purge	Days to Hold Locking Records	3
Purge	Days to Hold Multiple MRP	100
Purge	Days to Hold Pick Lists	30
Purge	Days to Hold Price Changes	30
Purge	Days To Hold Price History	90
Purge	Days to Hold Received Shipments	30
Purge	Days to Hold Received Transfer Records	3
Purge	Days to Hold Returns	30
Purge	Purge Received Transfers	Yes

System Admin Options

Shipping and Receiving

With the Shipping and Receiving functions, you can work with Direct deliveries, Warehouse deliveries, Transfer merchandise, and Returns.

This chapter explains the enhancements in the following modules:

[Direct Store Delivery](#)

[Return to Vendor](#)

[Transfers](#)

Direct Store Delivery

With India Localization patch applied, SIM captures and calculates tax on inventory delivered at the stores as Direct Store Delivery (DSD). When you create a purchase order in SIM, you can select the Supplier Tax Region and Taxpayer Type information. In case of RMS-created purchase orders, this information is interfaced to SIM from RMS.

To create a new PO:

1. From the **Main Menu**, click **Shipping & Receiving**.
2. On the Shipping & Receiving menu options, select **Direct Delivery**.
3. On the Direct Delivery menu options, select **Create**. The New screen appears.

Creating a PO

4. Select from the options available—Item, Supplier, or Purchase Order. When selected, the corresponding option is activated in the By Item/Supplier/Purchase Order fields.
 - Item

- a. Select Item.
 - b. In the By Item fields, enter Item ID and Supplier information.
 - c. In the Purchase Order field, select New.
 - d. Enter the Invoice Number.
 - e. Change the Date for the PO, if necessary.
The default is the current date.
- Supplier
 - a. Select Supplier.
 - b. In the **By Supplier** fields, enter the Supplier information.
 - c. In the **Purchase Order** field, select **New**.
 - d. Enter the Invoice Number.
 - e. Change the Date for the PO, if necessary.
The default is the current date.
 - Purchase Order
 - a. Select **Purchase Order**.
 - b. In the **By Purchase Order** fields, enter the Purchase Order number, the Supplier information is automatically populated on selecting the PO number.
 - c. Enter the **Invoice Number**.
 - d. Change the Date for the PO, if necessary.
The default is the current date.
5. Click **Next**. The Direct Delivery Detail screen appears.

Item	Item Description	UOM	Pack Size	Expected	Received	Damaged	Unit Cost(Excl...	Tax Amount	Unit Cost(Incl...	MRP
...										

Purchase Order Screen

6. Enter the Item ID and the number of received items in the column **Received**. The related information such as the **Item Description**, **Supplier**, **Unit Cost**, and **MRP** gets auto-populated retrieving information from Item Master/RMS.
 - Enter **Tax Region** and **Taxpayer Type** from the drop-down values.
The Tax Region and Taxpayer Type fields are mandatory and are used to calculate tax amount for each order line item.
 - PO created in RMS: In case of a PO created in RMS and received in SIM, RMS interfaces Tax Region and Tax Payer Type information as part of PO header. While receiving the PO in SIM, you can edit this information, if required.
 - The MRP in SIM is interfaced by RMS at each line item level as part of PO message.

- New PO: In case of a new PO, the MRP at each line level displays the primary MRP value.
7. Click **Calculate Tax** to calculate the tax amount.
After calculation, the following information is displayed as shown in the image below:

tax amount for each order line item
 cost including tax at order line item
 total cost including tax amount at header
 total cost excluding tax amount at the header
 total tax amount at header level.

Total Cost(Excl.Tax): Rs.88,800.00		Tax Region: 2000 - Kar...		
Total Tax Amount: Rs.0.00		Tax Payer Type: 1003 - Ind...		
Total Cost(Incl.Tax): Rs.88,800.00				
<input type="text"/> 				
id	Unit Cost(Excl....	Tax Amount	Unit Cost(Incl....	MRP
	Rs.100.00	Rs.0.00	Rs.100.00	Rs.200.00
	Rs.100.00	Rs.0.00	Rs.100.00	Rs.200.00

Calculated Tax for PO

8. Now you can **Confirm, Print, Add Item, Delete, or Cancel** the PO.
 You should not confirm a DSD receipt without calculating the tax amount for the receipt. The system requests you to calculate the tax before confirming the receipt. If you update the receipt after clicking Calculate Tax, the system again requests you to calculate tax before the receipt is confirmed.

It is recommended that you always calculate the tax before confirming the receipt. If you proceed without calculating tax, there may be discrepancies in tax amounts in the shipment tables of RMS and SIM. Only if the network connection between RMS and SIM is unavailable or RMS application is down, it is advised to receive without calculating the tax so that receiving flow is not disrupted.

Return To Vendor

With India Localization patch applied, SIM captures and calculates tax on inventory that is being returned to vendors from the store.

To create a new RTV:

1. From the **Main Menu**, click **Returns**.
2. On the Returns menu options, select **Create**. The RTV screen appears.

RTV Screen

3. On the **Return Type** box, select **Supplier**.
4. Enter the **Supplier ID**, **Authorization Number**, **Supplier Tax Region**, and **Taxpayer Type**.
The Tax Region and Taxpayer Type are mandatory fields and are used to calculate tax amount for each return line item.
In case of RTV created in RMS, RMS interfaces Tax Region and Taxpayer Type information and it is not editable in SIM.
5. Enter the **Item ID**.
The Item Description, UOM, Pack Size, and Current SOH are auto-populated.
6. Enter the quantity to be returned in **Qty** field.
7. From the **Reason** drop-down list, select the reason for the inventory return.
8. Specify the MRP of the item.
The MRP is editable for SIM created RTV and non-editable in case of RTV created in RMS. The MRP for RMS created RTV is interfaced by RMS at line item level as part of standard RTV message.
9. Click **Calculate Tax**.

You cannot confirm the RTV without calculating the tax amount. If you update the RTV after calculating tax, you need to calculate the tax again before the RTV can be saved or dispatched.

After calculation, the following tax information is displayed on the screen:

- cost excluding tax (used by RMS)
- tax amount for each return line item
- cost including tax at return line item
- total cost including tax amount at header
- total cost excluding tax amount at the header
- total tax amount at header
- the breakup of tax summed up for each tax type at the header level

Total Cost(Excl.Tax): Rs.4,696.85		Return Type		
Total Tax Amount: Rs.0.00		Warehouse <input type="radio"/>		
Total Cost(Incl.Tax): Rs.4,696.85		Supplier <input checked="" type="radio"/>		
Tax Region: 1000 - Vat Region 1000				
Tax Payer Type: 1000 - PN Test				
Reason	Unit Cost(Exc...	Tax Amount	Unit Cost(Inc...	MRP
Overstock	Rs.136.40	Rs.0.00	Rs.136.40	Rs.20.00
Unavailable Inve...	Rs.204.00	Rs.0.00	Rs.204.00	Rs.50.00

Calculated Tax for RTV

- Now you can click **Done** to exit the window. Alternatively you can Dispatch, Add Items, Delete, or Cancel the RTV. For further information, refer the *SIM User Guide*.

Transfers

All Store-to-Store transfers and Return-to-Warehouse (RTW) are considered as transfers and tax is calculated in SIM for each line item level when the transfer is dispatched.

Store to Store Transfers

To create a new transfer:

- From the **Main Menu**, click **Transfers**.
- On the Transfers menu options, select **Create**. The Transfers screen appears.

Transfer Screen

3. From the Search option, select for the Store to which the transfer has to be made.
4. Add comments, if any, in the **Comments** text box.

You need not add the Tax Region and Taxpayer Type of the destination location for transfers and RTW. For tax calculation purpose, these values are populated from master data in RMS.

5. Add the Item details. You can search for the item using the Search option.
6. Enter the quantities to be transferred in the **Qty** field.
7. Click **Calculate Tax**.

You cannot confirm or dispatch a transfer without calculating the tax amount. If you update the transfer after calculating tax, the system will force you to calculate the tax again before confirming the transfer.

After calculating, the following fields are calculated and displayed on the screen:

- cost excluding tax used to calculate the tax in RMS
- tax amount for each line item
- cost including tax at line item
- total cost including tax amount at header
- total cost excluding tax amount at the header
- total tax amount at header
- breakup of tax summed up for each tax type at the header level

Total Cost(Excl.Tax): Rs.77.00		Transfer To: 600002 - Sundar Andra pradesh store2			
Total Tax Amount: Rs.3.08					
Total Cost(Incl.Tax): Rs.80.08					
UOM	Pack Size	Qty	Unit Cost (Excl.Tax)	Tax Amount	Unit Cost (Incl.Tax)
Cases	1	1	Rs.77.00	Rs.3.08	Rs.80.08

Calculated Tax for Transfer

- Click **Done** to exit the window. Alternatively, you may **Dispatch**, **Add Items**, **Cancel**, or **Delete** the Transfer. For further information, refer the SIM User Guide.

Return-to-Warehouse

To return inventory to the warehouse:

- From the **Main Menu**, click **Shipping & Receiving**.
- On the **Shipping & Receiving** menu options, select **Returns**. The Return-to-Warehouse screen appears.

Return-to-Warehouse Screen

- From the **Return Type** box, select **Warehouse**.
- Select a **Warehouse** from the drop-down list.
- Enter **Authorization Number**.
- Add Item details; enter quantity to be returned in the **Qty** field and reason for the return.
- Click **Calculate Tax**.

You cannot confirm or dispatch a transfer without calculating the tax amount. If you update the transfer after calculating tax, the system will force you to calculate the tax again before confirming the transfer.

After calculating, the following fields are calculated and displayed on the screen:

- cost excluding tax (used to calculate the tax in RMS)

- tax amount for each line item
- cost including tax at line item
- total cost including tax amount at header
- total cost excluding tax amount at the header
- total tax amount at header
- the breakup of tax summed up for each tax type at the header level

Total Cost(Excl.Tax): AR\$4,041.02 Total Tax Amount: AR\$0.00 Total Cost(Incl.Tax): AR\$4,041.02		Return Type Warehouse <input checked="" type="radio"/> Supplier <input type="radio"/>		
Qty	Reason	Unit Cost(Excl....	Tax Amount	Unit Cost(Incl....
4	Externally Initiated ...	ARS202.05	ARS0.00	ARS202.05

Calculated Tax for RTW

8. Click **Done** to exit the window. Alternatively, you may **Dispatch**, **Add Items**, **Cancel**, or **Delete** the Transfer. For further information, refer the *SIM User Guide*.

Inventory Management

With the Inventory Management functions, you can manage the store inventory by adjusting stocks, view stock counts, request store order from warehouse or supplier, create store shelf replenishment, request price changes, create and print item tickets and shelf labels and many more functions.

This chapter explains the following in the Inventory Management module:

- [Price Changes](#)
- [Ticketing](#)

Price Changes

The Price Change functions allow you to request a price change for an item. After the price change is approved in the pricing system, you can print shelf labels and item tickets for the affected items. Price changes from the Oracle Retail Merchandising System automatically become active in SIM on the effective date.

There may be instances when goods/inventory delivered at the stores as direct delivery may have a different MRP from the one that exists in SIM/RMS or on the Purchase Order. With India localization patch, SIM can handle multiple MRP. If there is difference in the MRP, then you can create a price change for the item.

However, the price change can be requested in SIM only against the Primary MRP for an item-location because RPM is designed to run Price Change, Clearance and Promotion only against the Primary MRP.

To create a price change:

1. From the **Main Menu**, select **Inv Mgmt**.
2. On the **Inv Mgmt** menu options, select **Price Change**. The Price Change window opens.

Price Change Screen

3. Enter information in the Date Filters, Hierarchy Filters, and Additional filters as necessary to narrow the search for the price change you wish to modify.
4. Click **Search**. The Price Change List window opens. The list of Price Change requests appears on the screen.
5. To create a new price change, click **Create**. The Price Change Detail window opens.
6. Enter information in the fields or select from the drop-down lists:
 - a. **Item** – Enter the item number or click to look up the item.
 - b. **Price Change Desc** – Select the kind of price change from the drop-down list— Clearance, Promotional, and Permanent.
 - c. **Date** - Enter the effective date for the price change.
 - d. **New Price** – Enter the new retail price for the item. If the item is **MRP based cost Ind** enabled, the new price cannot be more than the MRP.

Price Change Detail Screen

7. Click **Done**. You return to the Price Change List window, where the price change is added with a status of Pending.
This new price change is sent to RPM for approval. The new approved selling price is then interfaced to RMS and SIM.

Price Change Request from SIM to RPM

The Price Change request in SIM can be created only against the Primary MRP for an item-location. RPM runs conflict checks for Price change request created in SIM and sends back an approval or rejection for that price change.

In case of Non-Primary MRPs for an item-location, RPM calculates the corresponding unit retail price using price change information for Primary MRP. RPM runs a conflict check against all non Primary MRPs. If the conflict check fails for a particular non Primary MRP (for e.g. Unit Retail becomes more than MRP), the new selling retail is not proposed for that MRP.

SIM downloads the non-primary MRPs and corresponding unit retail using a batch program.

Ticketing

The Ticketing functionality allows you to print shelf edge labels and item tickets for stock. With India Localization patch applied, the Item Ticketing for a price change displays the Primary MRP corresponding to the Unit Retail for which price change has been affected in RPM.

When creating an Item Ticket, SIM allows user to select an MRP from a drop-down list of active MRPs for that item-location and the corresponding Unit Retail for the selected MRP.

**Only Primary MRP is displayed in case the item has
Multiple MRP indicator is turned off.**

To request for Item Ticketing for a price change:

1. From the **Main Menu**, select **Inv Mgmt**.
2. On the **Inv Mgmt** menu options, select **Item Tickets**. The Search window opens.
3. Search by the Label Type as **Item Ticket**. Click Search. A list of price change requests appear on screen.
4. If you want to create a new Item Ticket, click **Create**. The Create screen appears as shown below.

Item Ticketing Screen

5. Enter the **Item ID**.
6. From the **Label Type** drop-down list, select Item Ticket.
7. Select the **Format** for the ticket.
8. Enter the number of quantities for the item ticket.
9. In the **Override Ticket Price** field, enter the new ticket price.
You cannot proceed to ticketing if you enter Override Ticket Price more than the MRP, if the item has **Retail Less than MRP** indicator enabled.

The screenshot shows a light blue dialog box with the following fields and values:

- User: 140000
- Promotion ID:
- Effective Date:
- Quantity:
- Override Ticket Price:
- MRP:
- Multi Unit Quantity:

Creating Item Ticketing Screen

10. Click **Done**. The Item Ticket is in pending state until it is printed.

SIM does not allow Auto-Ticketing for line items in Purchase Orders against which new MRP's have been received into the Store.

Lookups

Using Lookups, you can view information about merchandise, supplier, or containers. This chapter explains enhancements made in the Item Lookup module.

In Item Lookups, SIM displays the Primary MRP from RPM, although it maintains multiple MRP for any item-location.

The Item Lookup screen now displays the following new fields:

- **Cost Based MRP**
- **Retail less them MRP**
- **MRP (at that item-location)**
- Existing **Current Retail** field displays the Unit Retail corresponding to Primary MRP at that item-location

Item Lookup Screen

To view the item lookup screen:

1. From the **Main Menu**, select **Lookups**.
2. On the Lookups screen, select **Item Lookup**.
3. Enter the Item number you are looking for.
Item Detail screen opens where you can view the new fields added in the Pricing section.
 - MRP
 - Cost Based MRP
 - Retail Less Than MRP

The primary MRP and the corresponding Unit Retail is maintained in the item-location table. RPM marks one MRP from the list of MRPs available at item-location as primary MRP. The selling retail associated with this Primary MRP is used as unit retail for an

item-location in RMS for all Stock Ledger calculations. SIM captures the new non-Primary MRP from RPM as part of price change downloads.

Appendix: Hand Held Device

This chapter is a quick reference guide to the changes/modifications made to the handheld device with Oracle Retail Store Inventory Management (SIM). For complete information on SIM Handheld device, refer the *Oracle Retail Store Inventory Management, Handheld Terminal Quick Reference Guide*.

This chapter contains the following sections:

- [Shipping and Receiving](#)
- [Inventory Management](#)
- [Item Lookups](#)

Shipping and Receiving

This section explains the Handheld Device enhancements made in the following modules:

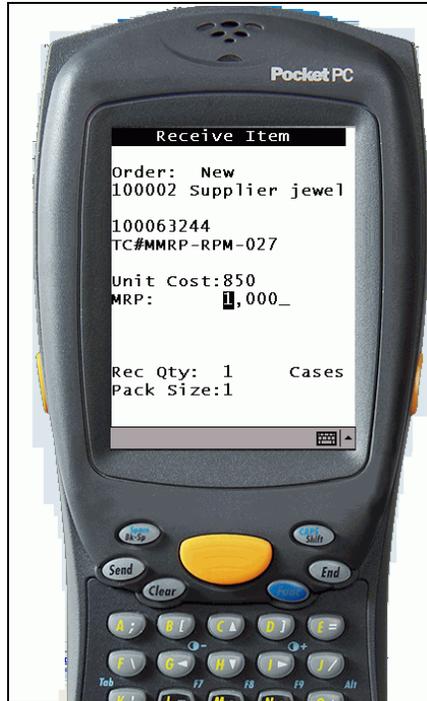
- [Direct Delivery](#)
- [Return to Vendor](#)

Direct Delivery

The SIM handheld device captures MRP and calculates tax on inventory delivered at the stores as Direct Store Delivery (DSD). When creating a purchase order, you can select the supplier Tax Region and Taxpayer type information which is interfaced to SIM from RMS. In case of RMS-created POs, the supplier Tax Region and Taxpayer type information is defaulted based on the data set up in RMS which be changed.

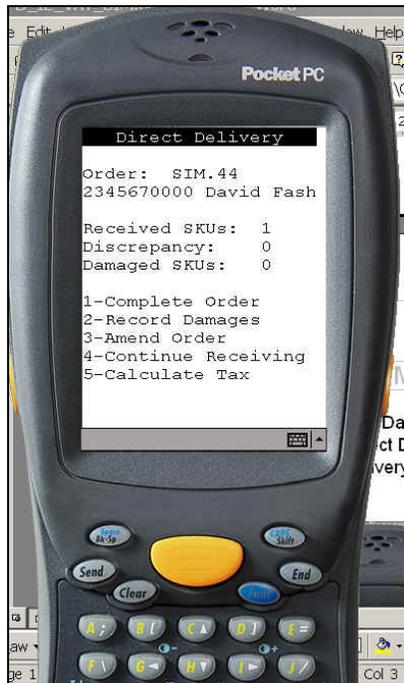
To create a purchase order in the handheld device:

1. From the Main Menu, select 1 Shipping and Receiving.
2. Select 1 Direct Delivery.
3. Scan the item barcode.
4. Enter 1 to create a new order.
5. Enter the Invc. No. and click Enter.
6. Enter the supplier Tax Region and Taxpayer Type.
7. Scan the item barcode.



Handheld Device showing the Item Receiving

8. Enter the number of received SKUs. The scanned item is received.
9. In Direct Delivery Summary, select the option 5 - Calculate Tax.



Handheld displaying the Direct Delivery

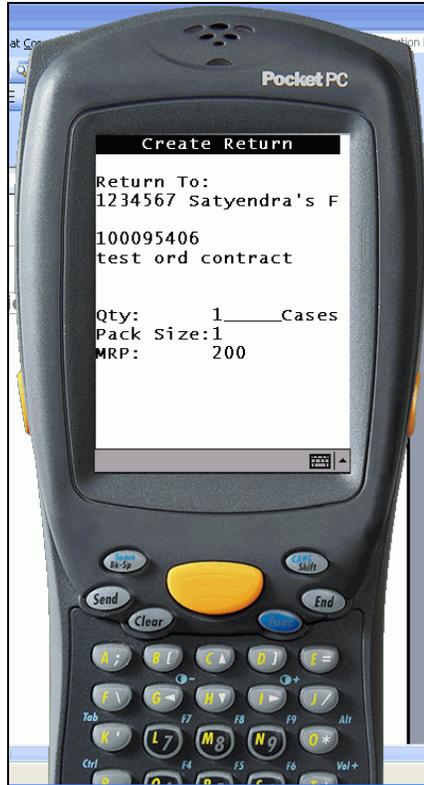
10. Tax Detail screen is displayed. Click 1 – Confirm Delivery to confirm the receipt.

Return to Vendor

The Handheld device captures and calculates tax on inventory that is being returned to vendors from the store.

To create a return:

1. From the Main Menu, select 1- Shipping and Receiving.
2. On the Shipping and Receiving menu, select 4 - Returns.
3. On the Returns menu, select 1 - Create a Return.
4. Select the return destination:
 - Return to a Warehouse
 - a. Press 1 Warehouse.
 - b. Select a warehouse from the list.
 - Return to the Supplier
 - a. Press 2 Supplier.
 - b. Enter supplier Tax Region and Taxpayer type, if the RTV is being created in SIM. If the RTV is created in RMS, these fields will be defaulted and if required, edit the RTV.
 - c. Scan the item.
 - d. Select the supplier from the list.
5. Enter the return authorization number.
 - a. Press Enter.
6. For each item to be returned:
 - a. Scan the item and press Enter.
 - b. Select a Reason Code.
 - c. In the Qty field, enter the number of cases or standard units of measurement.
 - d. Enter the Pack Size.
 - e. Enter the MRP of the item and press Enter.
7. Press * to view a summary.



Handheld device showing the Item Return

Inventory Management

This section explains the Handheld device enhancements made in the [Item Ticketing](#) module.

Item Ticketing

The Ticketing functionality allows you to print shelf edge labels and item tickets for stock. The Handheld device displays the Primary MRP corresponding to the Unit Retail for which price change has been affected in RPM.

When creating an Item Ticket, SIM allows user to select an MRP from a drop-down list of active MRPs for that item-location and the corresponding Unit Retail for the selected MRP.

1. From the Main Menu, select 2 Inv. Management.
2. On the Inv. Management menu, select 6 Item Tickets.
3. Scan the item code and enter.
4. Select the label format.
5. Print the item tickets by selecting the printer. The Item Ticketing displays the MRP of the item.

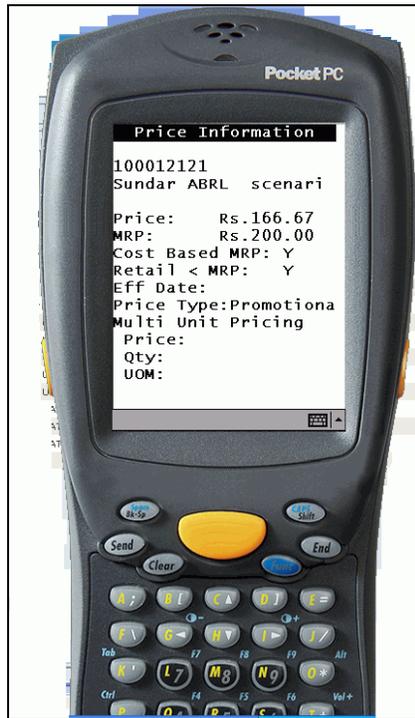


Handheld device showing the Item Ticketing

Item Lookups

To look for item information:

1. From the Main Menu, select **3** – Lookups.
2. Select **1** – Item Lookup.
3. Scan the item.
4. View item information.
 - a. Press **1** to view Price Information.
 - b. Press **2** to view Allocations information.
 - c. Press **3** for inventory details. See additional information by pressing <next>.
 - d. Press **4** for related items.
5. For Price Information, Press **1**.
 The Price Information of the item scanned is displayed. MRP, Cost Based Ind, Retail Less than MRP Ind, Effective Date, Pricing Type, Price, Qty, and UOM information is displayed on the handheld screen.



Handheld Device showing the Price Information