Oracle® Retail Store Inventory Management

Implementation Guide, Volume 3 – Mobile Store Inventory Management
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Oracle® Retail Store Inventory Management Implementation Guide, Volume 3 – Mobile Store Inventory Management, Release 13.2.4

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Oracle Retail Store Inventory Management Implementation Guide, Volume 3 – Mobile Store Inventory Management, Release 13.2.4

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Preface

The *Oracle Retail Implementation Guide, Volume 3 – Mobile Store Inventory Management* document provides detailed information about using the Mobile Store Inventory Management handheld utility to perform SIM functions.

Related Documents

For more information, see the following documents in the Oracle Retail Store Inventory Management Release 13.2.4 documentation set:

- *Oracle Retail Store Inventory Management Data Model*
- *Oracle Retail Store Inventory Management Implementation Guide, Volume 1 – Configuration*
- *Oracle Retail Store Inventory Management Implementation Guide, Volume 2 – Integration with Oracle Retail Applications*
- *Oracle Retail Store Inventory Management Implementation Guide, Volume 4 - Extension Solutions*
- *Oracle Retail Store Inventory Management Installation Guide*
- *Oracle Retail Store Inventory Management Operations Guide*
- *Oracle Retail Store Inventory Management Release Notes*

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https://support.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

When you install the application for the first time, you install either a base release (for example, 13.2) or a later patch release (for example, 13.2.4). If you are installing the base release and additional patch and bundled hot fix releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch and bundled hot fix releases can contain critical information related to the base release, as well as information about code changes since the base release.

Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following Web site:
http://www.oracle.com/technology/documentation/oracle_retail.html

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

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."

```
This is a code sample
```

It is used to display examples of code

1

Mobile Store Inventory Management

Oracle Retail Mobile Store Inventory Management (SIM Mobile) provides the user with the ability to perform a variety of inventory tasks in the store using a mobile hand held device while walking the aisles. This method of interacting with SIM provides efficiency, accuracy and improves customer satisfaction.

> **Note:** For this document, the Mobile Store Inventory Management on a mobile hand held device is referred to as the **handheld**.

In general, the same tasks that can be performed on a PC can be performed with the handheld, with the exception of price creation, store orders, stock count authorization and administrative features.

The following functions are supported:

- Warehouse Receiving
- Store-to-Store Shipping and Receiving
- Returns to Vendor or Warehouse
- Receiving Direct Store Delivery
- Inventory Adjustments
- Stock Counts
- Item Request
- Sequencing
- Pick Lists
- Item Tickets
- Item Basket
- Lookups – item, container and supplier

It is possible to initiate many tasks on the PC and complete them on the handheld. It is also possible to initiate tasks on the handheld and finish them on the PC.

2

General Workflow

Options and Permissions

Not all functions described in this document might be available to you. Whether a function is available might depend on your security permissions or the system and store options used.

Multiple Users in SIM

SIM contains activity-locking functionality. This allows one user to update a transaction at a time. Depending on the functional area, if another user is processing a transaction that you want to initiate, you might receive a prompt to take over the transaction. If you take over the transaction, the original user receives a message when they try to save the transaction that they no longer have the lock. This is to ensure that only the user who currently owns the lock on the transaction can update the transaction.

Only two dialogues support multi-user processing:

- Stock Counts can be configured to allow multiple users to scan for the same transaction on the handheld. The PC and the handheld are mutually exclusive, so the PC can lock out multiple users in this dialogue.
- Warehouse Quick Receiving allows multiple users to scan containers for the same Advanced Shipment Notice (ASN). However, the detailed Warehouse Receiving dialogue allows only a single user to use the transaction.

Scan-Scan Functionality

Scan-Scan functionality in SIM is a term that describes the ability to scan the same item multiple times and incrementally increase the quantity of the item for each scan.

The following dialogues allow scan-scan functionality in certain modes:

- Receive a direct delivery
- Receive shipments at the case level from a warehouse
- Create a transfer
- Receive a transfer
- Create a return
- Transfer requests
- Enter stock count details (unguided)
- Item requests
- Inventory adjustments

Scan-Scan UIN Functionality

The user can scan a Unique Identification Number (UIN) that is associated with a different item without being forced to exit the **Scan <UIN Label>** screen.

The user will not need to select **Done** to exit the UIN screen before being able to add a UIN of another item.

For example:

A stock count is created for the following items:

- Item A -- UIN 123
- Item B -- UIN 124

The user scans **UIN 123**.

The **Scan <UIN Label>** screen is displayed showing that one quantity was assigned to item **A**.

The user scans **UIN 124**.

A screen is displayed showing that one quantity was added to item B.

> **Note:** It will work similar to non-UIN items for unguided counts where the user can scan-scan without being interrupted.

Shortcut Keys

The following table describes shortcut keys for the SIM handheld:

Key	Description
Esc or Clear	Returns you to the previous window without saving any information. SIM allows you to use Esc or Clear only where appropriate. If the handheld has a Clear key, use Clear. If the handheld does not have a Clear key, use Esc.
Enter	Submits the information to SIM.
@ (Shift-2)	Toggles the unit of measure between cases and the standard unit of measure.
((Shift-9)	There is additional information that you can view. You can also press the <next> key.
& (Shift-7)	Returns you to the previous window if you used <next> to view additional information. You can also press the <prev> key.
* (Shift-8)	Brings you to a Summary window. You can also press the <total> key.
! (Shift-1)	Search for information.

> **Notes:** Handheld devices might have different buttons used to send these characters.
>
> Depending on the dialogue, only certain shortcut keys are available.

Error Messages

If you scan information with the handheld that SIM does not recognize, you receive an **Invalid** message. To continue, press **Enter** and scan the next item.

If you enter an alphanumeric or negative quantity or value on the handheld, you receive an **Invalid** message. To continue, press **Enter** and enter the correct quantity.

> **Note:** The handheld emits a double-beep in case of errors, notifying the user something is wrong.

Print Functionality

It is possible to set up default reports on the PC client, which are printed on the handheld. Many transactions are enabled to print these default reports to their respective default printers when the transaction is completed.

It is not possible to re-print default reports from the handheld.

Select an Item from a List

All list objects are given a corresponding number that you must enter to select that object. For example:

```
1–1000 Minneapolis
2–1012 St Paul
3–1007 Eden Prairie
```

To select Eden Prairie from the list, press **3**.

3

Shipping/Receiving

Direct Delivery

The handheld allows for the receiving of merchandise from a supplier with a purchase order written for shipment directly to the store, or without an existing purchase order. SIM also allows receiving against purchase orders with Advanced Shipment Notices (ASN) and created through DEX/NEX.

The direct store delivery option enables a store user to identify a purchase order (PO) by scanning an item to be delivered or using the PO number. The system will verify the item is valid and display a list of valid suppliers of the item. Once the supplier is identified, the store user will select the PO that is associated to the selected supplier (or a new PO can be created for some suppliers). The store user will be prompted to enter any appropriate invoice information, including the invoice date.

Process

The process begins as the user scans all items to indicate they have been received, which can be done at item or case level. If unexpected items are on the shipment, the user has the ability to add those items to the order. This feature is configurable and can be enabled or disabled at a system administration level. Unit cost can be displayed for those items on the purchase order (configurable to display or not display). Once the user indicates the delivery is complete, SIM will print a delivery notice, with all delivery details, for both the user and the driver. Simultaneously, SIM updates the store's on-hand inventory for the received items. The necessary information will be sent to the central merchandising and financial systems to create and close the purchase order and match against the upcoming invoice.

During the receiving process, the store user has the opportunity to record any damaged or missing items on the receipt.

In the scenario where a direct delivery being received is of substantial size and cannot be completed at one time, the user has the ability to save the delivery with **In Progress** status. This enables the user to save what has been received to that point and return at a later time to continue receiving.

Confirmation

Any discrepancies from the original ASN will require confirmation by the user. This confirmation, however, can be controlled through a system option.

When the user confirms the delivery, the system performs the supplier attribute-based discrepancy checks. The supplier attribute values for the delivery exception are:

- Allow any discrepancy
- Allow overages but not short receipts
- Do not allow any discrepancies

This value is a supplier attribute. It can be set up manually in SIM for a stand alone environment. The user has an option to override the check based on the permissions.

Received

Once the user has completed receipt of the entire direct delivery it will be moved to a **Received** status. At this point, changes to the delivery can no longer be made on the handheld.

As in most dialogues, it is possible to start the transaction on the handheld, save it and complete it on the PC. It is only possible to have a single user work on a given delivery.

UINs can be captured on the handheld if the item is set up to order.

For PO's with an ASN applied, the user has an option to select **Reject Delivery** from the Direct Delivery summary screen to reject the entire delivery. This option is enabled if the user has enabled the permission for this option (see **Appendix: SIM Permissions** in *Oracle Retail Store Inventory Management Implementation Guide, Volume 1 – Overview*).

If the user chooses to reject the delivery, all the received quantity will be set to zero and the delivery will be confirmed. If the delivery is rejected, the user can view the information on the DSD, but cannot edit nor make any Receiver Unit Adjustment.

Warehouse Receiving

Two different dialogues are supported on the handheld to support warehouse deliveries. In either dialogue, the process starts by scanning a valid container ID.

The Warehouse Quick Receiving dialogue is used in SIM to enable a user to receive containers in a single-step process for a single ASN or across multiple ASNs. This method is especially effective when working with consolidators or large deliveries. This dialogue allows multiple users to receive containers, and SIM can be configured to allow auto-completion of the ASN when every container is received.

When scanning a container that is listed as missing from a confirmed ASN in Quick Warehouse Receiving on the handheld, SIM will receive the container instead of prompting the user with an error message. The receiving process follows the same logic as on the PC. The result of this operation is that the receipt is amended with the missing container now received and a message is sent on to RMS to bring both systems in sync.

The second dialogue is used in SIM to receive at three different levels, but in a more methodical fashion by first identifying a single ASN:

- An entire ASN can be received without any detailed confirmation.
- The user can identify each container individually and receive it.
- The items in each container individually can be received.

Only a single user can work on the same ASN to prevent item entry discrepancies. After confirming the ASN receipt, it is not possible to make any adjustments through this dialogue. Adjustments will need to be made on the SIM PC client.

A system option exists to not allow additional items to be added to the delivery.

This dialogue allows a combination of container-level or item-level receiving. For example, a user could receive all undamaged containers, but can decide to detail receive any damaged containers at the item level.

It is also possible to use the quick warehouse receiving dialogue to scan containers. This process is a single-step process since it only requires a single scan to have the container received. It is required to scan UINs if the item is set up to capture serial numbers at receiving time.

> **Note:** For audit control, the user can put a few containers to the side for detailed receiving in the second dialogue.

Store-to-Store Transfers and Transfer Requests

Store-to-store transfers can be initiated and dispatched from the handheld. It is also possible to dispatch or edit transfers created on the PC or through external systems.

Transfer requests can be created, modified and deleted from the handheld, but it is not possible to approve them on the handheld. Approving a transfer request is considered an administrative function a manager performs on the PC.

Only a single user is able to work on a single transfer at one time. The intent is to keep transactions small so the user is assumed to work on a single shipment or delivery at one time.

When creating a transfer request or transfer, it is possible to use Scan-Scan Functionality. Unlike warehouse deliveries or DSD delivery, for store-to-store transfers, the user is required to scan the serial number. This is regardless of the item being set up as an AGSN or serial number.

Returns

The Returns functionality enables the store user to create, edit, dispatch and return from the store to a warehouse, finisher, or directly to the vendor.

Return requests provide corporate RMS users the ability to create return requests from a store to a warehouse or supplier and send the request to the individual store.

The handheld does not allow the approval of return requests. Approving a return request is considered an administrative function a manager performs on the PC.

For Return to warehouse or finisher, the context type and value can be entered for the return, indicating the purpose of the return.

When creating or adding items to a return, SIM allows scan-scan functionality (see Scan-Scan Functionality). Similar to most transactions, to guarantee data integrity, only a single user is allowed in a single unique transaction at the time.

If the item is set up to handle UINs, the user must identify which specific serial number is returned to the warehouse, finisher, or vendor. UIN's must be in the proper status to create the return.

A return can be made for available or unavailable stock. For a return to warehouse and finisher, the inventory status is defined on the header of the return, and all inventories on the return are taken from unavailable stock, or all items are taken from available stock based on the selected inventory status. For a return to vendor, the system prompts the user on a per-item basis to use unavailable stock (if it exists) for the items as they are added. The user may choose to add items that return from unavailable and available stock on a return to vendor.

4

Inventory Management

Inventory Adjustments

Inventory Adjustments allow users to move inventory out of the system, mark inventory as unavailable to sell, add inventory, or move inventory back from an unavailable state.

The handheld allows the user to identify the item and a reason code that will determine the disposition of the item.

If the item is set up to handle Unique Identification Numbers (UINs), the user must identify which specific serial number is adjusted. If the item is set up as an auto-generated serial number (AGSN) and the user tries to increase the SOH, then UINs are created when the user confirms the inventory adjustment.

Stock Counts

SIM provides the ability to schedule, perform, and authorize stock counts. Portions of the stock count functionality, such as the setup of product groups, schedules, and authorizations, are performed on the PC only. The actual counting of inventory can be performed on both the PC and the handheld.

The following types of stock counts can be counted on the handheld:

- Ad hoc
- Unit
- Unit and Amount
- Problem Line

There are three different stages a Stock Count goes through:

- Stock Count
- Stock Re-count (optional)
- Authorize

Only the Stock Count and Stock Re-count stages apply to the handheld.

The handheld allows the user to count items through a guided or unguided count method that is determined during the product group setup on the PC.

> **Note:** The final authorization of the stock count needs to be performed on the PC.

Guided Counts

Guided Stock counts (Unit, Unit and Amount, Problem Line) are divided so that each user of a handheld device performs a stock count according to a macro location (for example, vegetables, cereals, and so on). Guided stock counts will prompt the user to scan the next item in sequence. If sequencing is not set up for the items, the user will be prompted in item number order.

Unguided Counts

Unguided Stock Counts (Ad, Unit, Problem Line, Unit and Amount) allow the user to scan items on the handheld without being prompted which item to scan. There is still an option to count an unguided count by macro location. The user might also choose to break down an unguided master count by hierarchy (dept/class/sub-class).

Unguided stock counts decrease the time it takes to completely scan a count and provides more flexibility. Multiple users are able to scan items for the same child stock count. This is controlled through a system option. The user will be alerted if they attempt to complete the count while other users are still in the count.

For unguided counts, the following menu options and functions exist:

- Return to Count – takes the user back to the count and saves all changes but does not commit the changes.
- Quick Save – changes are committed to the database and the user is returned to the count.
- Save and Exit – changes are committed and the user is returned to the list of master stock counts.
- Discard Changes – the user is prompted if they want to discard their changes.
- Complete Count – changes are committed and the stock count is completed and moved to the next stage.
- Items Left to Count – allows the user to scan through items that have not yet been counted and enter a count quantity for the item. This feature is not available for ad hoc counts.

The unguided process also allows for a review process that is typically performed by a manager as a final check before moving to the next stock count stage. The user will be prompted with the old count quantity and can manually enter a new count quantity to override the old quantity.

Count Process

In order to begin the initial count, the user selects the Stock Count option and accesses the master count from a list of stock counts. Once the master count is selected, the user will need to select a child count to begin the count process. The **s** option on the bottom of the screen enables the user to search for a specific child count. The user can search by the child barcode, child ID or child description. Only uncounted child counts are returned.

> **Note:** If no master counts exist, the user will be alerted that no stock counts currently require any action.

When the user scans the item, SIM performs an item validation to ensure the item is valid and that it is on the count. Since ad hoc counts do not have a pre-defined list of items, any item can be scanned on an ad hoc count.

During the count stage, the user will scan the item and can enter the count quantity for each item on the count. Scanning the first item triggers the snapshot to be taken for Unit, Problem Line and Ad hoc counts. For Unit and Amount counts, the user must trigger the snapshot from the PC; however, the count can still be started on the handheld. The count will not move to the next stage of the re-count until the snapshot has been taken. Once the last item is counted and the snapshot has been taken, the count will move to the next stage.

The re-count stage is optional and is determined during the Product Group setup on the PC. If the re-count discrepant items option is selected and discrepant items exist, a re-count will be required. The user will be able to enter a re-count quantity for each item on the count. Once the last item is counted, the stock count will move to the Authorize stage and will no longer be accessible on the handheld.

The user can amend the count or re-count at any time. If the user does not wish to complete the count in the current session, the count can be saved and completed at a different time on the handheld or the PC. Before completing the count, the user will be prompted if there are any uncounted items.

The user will be able to register any UINs that are required to be counted. Only those UINs that are associated and supposed to be in inventory can be added during the counting or re-counting phase.

Item Requests

The Item Request functionality gives the user the ability to request inventory for individual items using the replenishment and sourcing parameters of RMS from within SIM.

The Item Request functionality enables the user to request items regardless of the replenishment type normally used by the merchandising system to replenish the item.

From the handheld, the user can do the following:

1. The user can create, edit, delete or request an item request.

   Pending item requests can be accessed whether the request was created manually by a user or automatically by the Product Group Scheduler. The item request can be requested immediately at the time of creation or saved and requested at a later time on either the handheld or the PC.

2. When creating an item request, the user can specify a request delivery date or accept the default date of tomorrow.

   The date defaults to the next day since the item request is used to ask for quantity above and beyond the regular replenishment cycle. By default, the request has urgency and RMS tries to fulfill it tomorrow.

   > **Note:** When entering a request delivery date, SIM performs a date validation and prompts the user with an error message. SIM allows the user to enter today's date. The validation on today's date removed, SIM allows the user to enter today's date and any future date. An error message should only display if the user enters a date prior to today's date.

3. After specifying the request delivery date, the user can select a default timeslot to specify what time of day the delivery occurs.

   The timeslot option is only available if the **Display Item Request Delivery Timeslot** store parameter is set to allow it, and only applies to store order replenishment items. The timeslot option allows the retailer to have multiple deliveries per day for the same item.

4. The next step is to scan the barcode of the item being requested. The user enters the request quantity for the item.

As each item is scanned, the user can view the stock on hand for the item and the number of items in transit. This will be helpful in determining the amount the user wants to request for the item. On this screen, the user has the option of changing the timeslot for the current item.

5. After all of the desired items have been added and quantities entered, the user has the ability to submit the request immediately or to save the request for later approval.
   a. If the user chooses to edit a request, a list of pending requests will appear and can be identified by the delivery request date and the department under which the majority of the items fall. If there are system generated item requests (based on a scheduled item request), there will be an item request description that can be used to identify the request.
   b. If the user chooses to delete a request, a list of pending requests will appear and the user will be able to view the details of each request before deleting.
6. When the user finally submits the request, all items will be sourced from either a Warehouse or through Supplier Purchase Orders, depending on the sourcing parameters for the item specified in the merchandising system.

   All inventory requested will be sourced to the store at the earliest possible date given the replenishment review date, the supplier or warehouse lead time, and any other factors that may influence the time it takes a delivery to reach the store.
7. Once the user submits the item request, the request moves to Completed status and will no longer appear on the handheld but can be viewed on the PC.

Sequencing

Sequencing gives stores the ability to know the exact location of an item in a store. Sequencing a store will improve store processes and reduce massive amounts of time spent looking for items.

Sequencing is broken down into two parts: macro and micro. Macro sequencing sequences all locations that are set up in the store. The micro sequence is found within the macro sequence. Micro sequencing sequences all the items that are attached to the macro sequence location.

The handheld enables users to do the following:

- Add items to a sequence.
- Remove items from a sequence
- Re-organize the order of the sequence

For more information about using the handheld to perform a function, see the

Pick Lists

Pick lists are created to move inventory from the backroom into the shop floor for in-store replenishment. This feature requires sequencing to be turned on, as SIM needs to understand how much inventory is on the shop floor for a specific item as opposed to the back room, and how much capacity that item has on the shop floor.

The handheld provides the following functionality:

- Action within and end of day pick lists created on the PC
- Create new pick lists
- Amend suggested quantities
- Validate picked items
- Complete the pick list

Item Tickets

The Item Tickets option on the handheld can be used to print AGSN tickets, item tickets and shelf labels. The handheld can only print manual individually created tickets.

1. The user selects whether they want to create an Item Ticket or Shelf Edge Label. This will always default to Item Ticket, but the user can toggle to select Shelf Edge Label.
2. After scanning the item barcode, the user is brought to the Format List screen where a format must be selected for the ticket or label.
3. Once a format is selected, the user can enter the number of tickets they want to print and also has the option to override the price of the item. If an override price is entered, this is the price that appears on the ticket.
4. When the user presses **Enter**, the tickets or labels will print. It is possible to use belt printers as long as they have their own unique printer network ID.

If using AGSN items, users will be able to re-print serial numbers.

Item Basket

SIM often has the only wireless network in the store. It is very expensive to run two applications with different protocols in the same store, especially with smaller retailers. Therefore, the SIM wireless device is very well suited to aid the retailer with line busting, investigative item lists or creating gift registries.

The handheld provides a new menu option that can capture items and their quantities by scanning the UPC.

When all items are captured, the handheld will present an option to print a ticket with a barcode for the customer or allow the customer to enter in their own ID. This barcode can be scanned or entered by a third-party system to retrieve the basket from SIM.

A purging process will delete all baskets after a 24-hour period.

After the user scans the barcode or enters the ID, a web service call can be made to SIM to retrieve the basket information.

Note: Item Basket supports only sellable items.

For more information about using the handheld to perform a function, see the **Item Basket Integration Workflow** and **Item Basket Handheld Workflow** sections.

5

Lookups

Item Lookup

The Item Lookup functionality provides the business user with the ability to view information related to an item:

- Price information – The user can view current price, effective date, price type and, if applicable, multi-unit price information.
- Allocations – View allocations or warehouse deliveries the store is expecting to receive from the warehouse.
- Inventory details – The user can view inventory details for current items such as stock on hand, on order, in transit, reserved inventory, inventory received in the store today, customer orders, and backroom/shop floor/delivery bay inventory.
- Related items – Store users can quickly and easily determine what related items exist in the store by accessing the **Related Items** option. The user can lookup related items for the current item and view stock on hand information, differentiators, and so forth.
- Item attributes – The user can view attributes for the current item such as standard unit of measure, pack size, whether or not the item is a pack item, a concession or consignment item, sellable or non-sellable and whether or not it is orderable.
- Print item report – The user can print a report to view information about the item such as SKU, description, price, differentiators, and inventory position.
- Price history – Provides the user with a list of price changes for the item, excluding promotional price changes.
- Stock locator – The user can look up inventory for the current item at other stores and will also be able to determine if any of the store's buddy stores have any inventory for the item.
- Customer orders – The user can view any customer orders that exist for the current item.
- User-defined attributes –The user can view any UDAs that exist for an item.

For more information about using the handheld to perform a function, see **Item Lookup Handheld Workflow**.

Supplier Lookup

The Supplier Lookup functionality provides users with the ability to view information about the supplier such as:

- Supplier ID
- Supplier name
- Headquarters address, phone, contact, contact e-mail
- Return address, phone, fax, contact e-mail
- Other addresses for the supplier
- Status
- Return allowed
- Return authorization required
- Primary Supplier – The primary supplier details of the item are displayed. Any additional suppliers are displayed.

For more information about using the handheld to perform a function, see Supplier Lookup Handheld Workflow.

Container Lookups

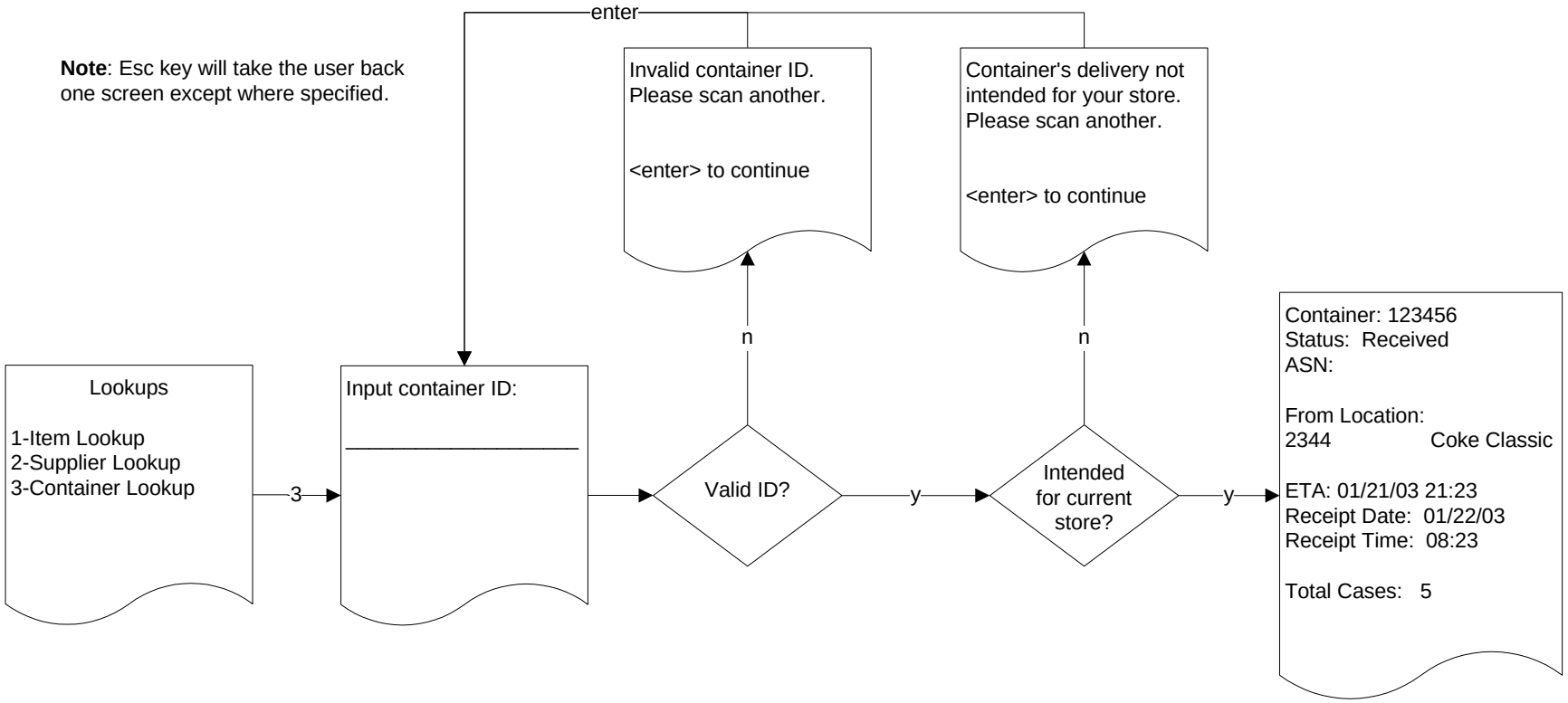
The Container Lookup functionality provides users with the ability to view information about the container such as:

- Container ID
- Advanced Shipment Notice (ASN) number
- Status (received, in transit, and so on)
- Receipt date and time
- ETA
- From location
- Total number of cases

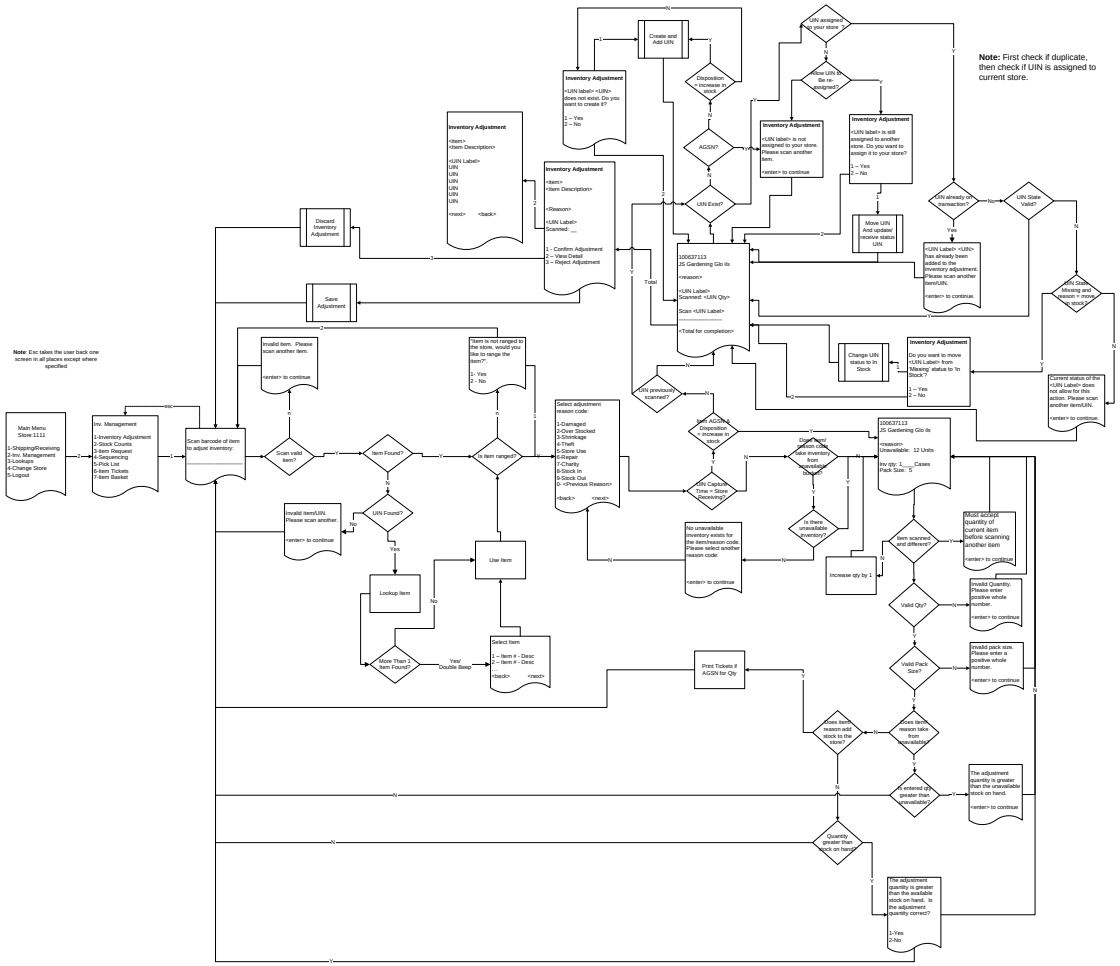
A

Appendix: Workflow Diagrams

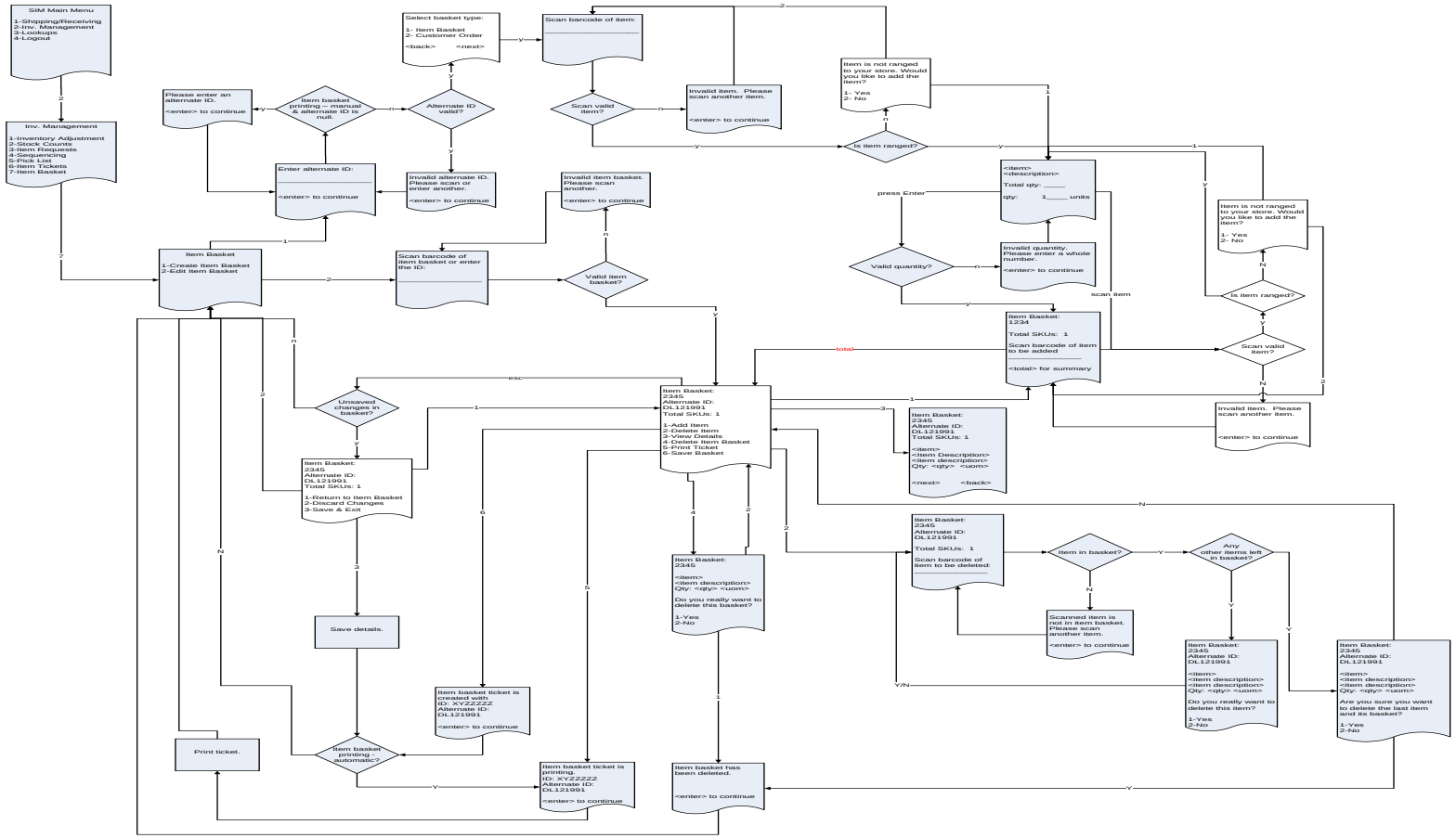
Container Lookups Handheld Workflow



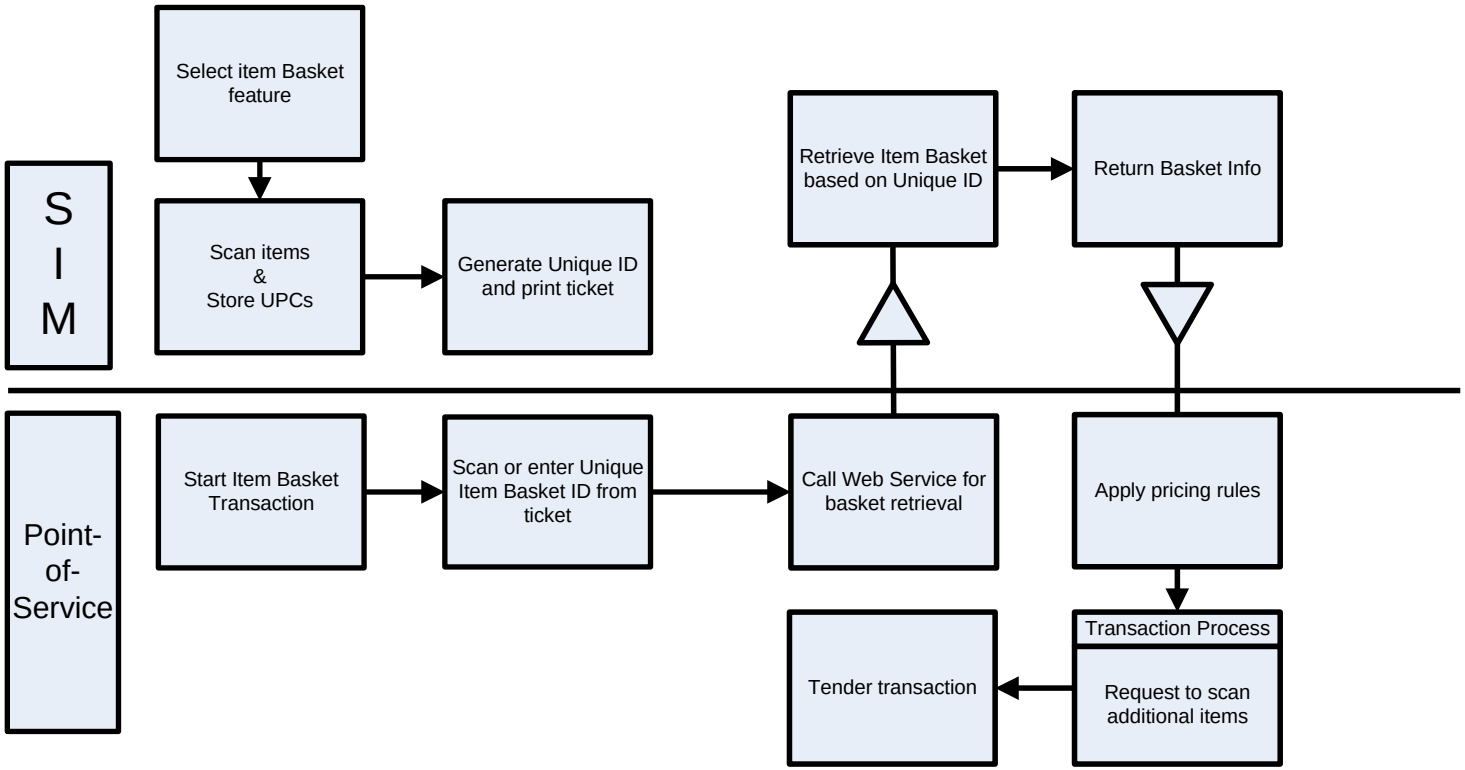
Inventory Adjustment Handheld Workflow



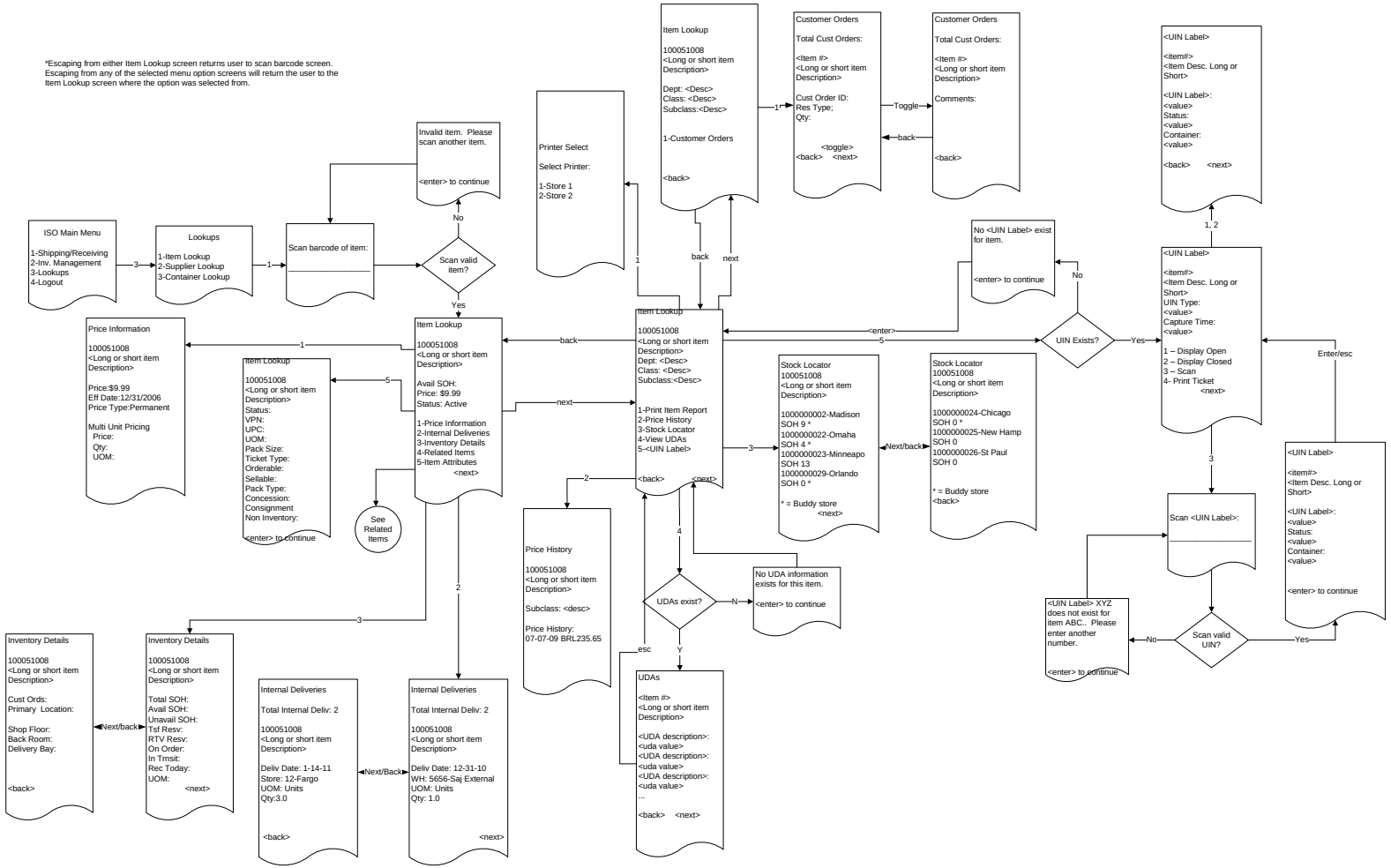
Item Basket Handheld Workflow



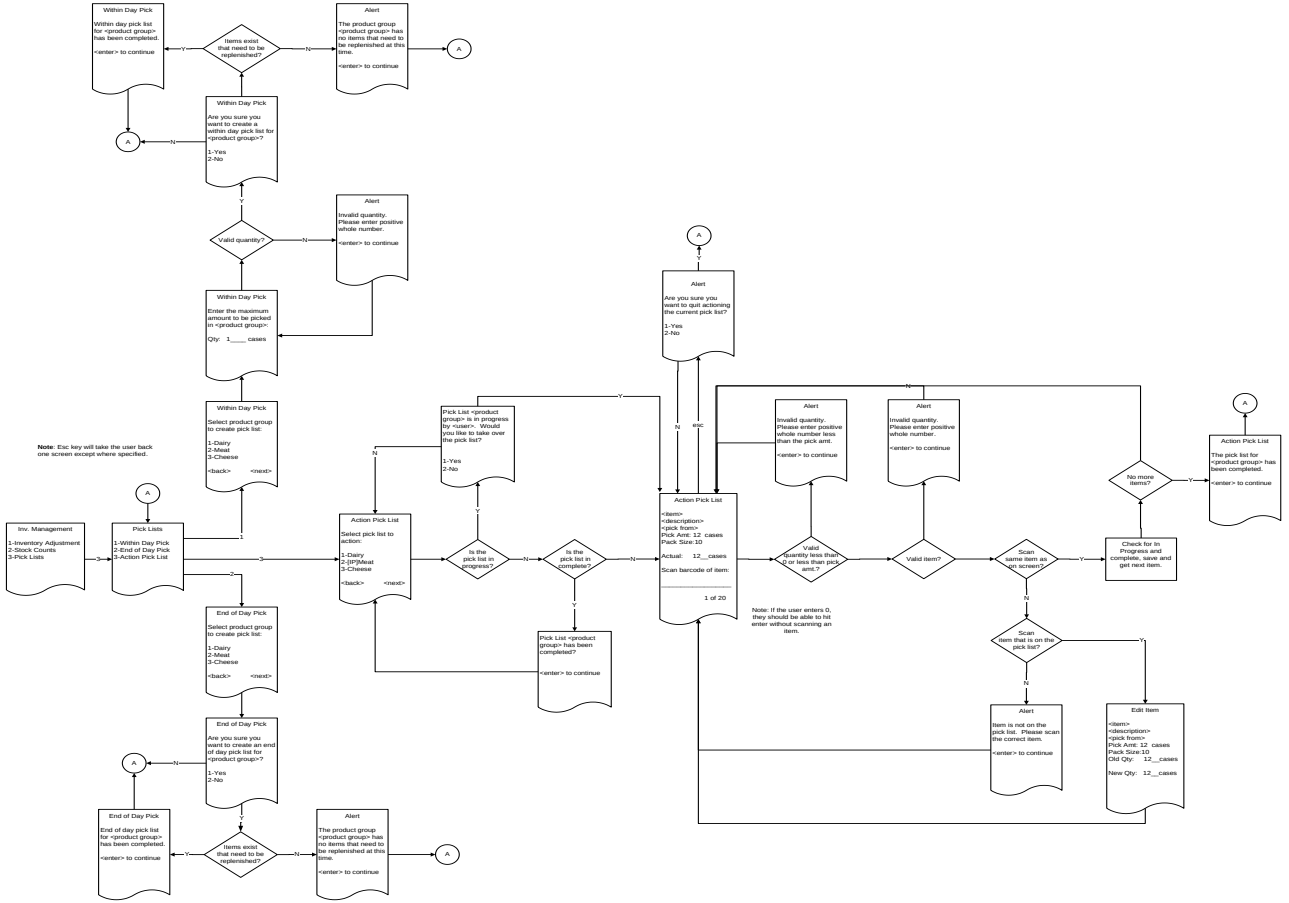
Item Basket Integration Workflow



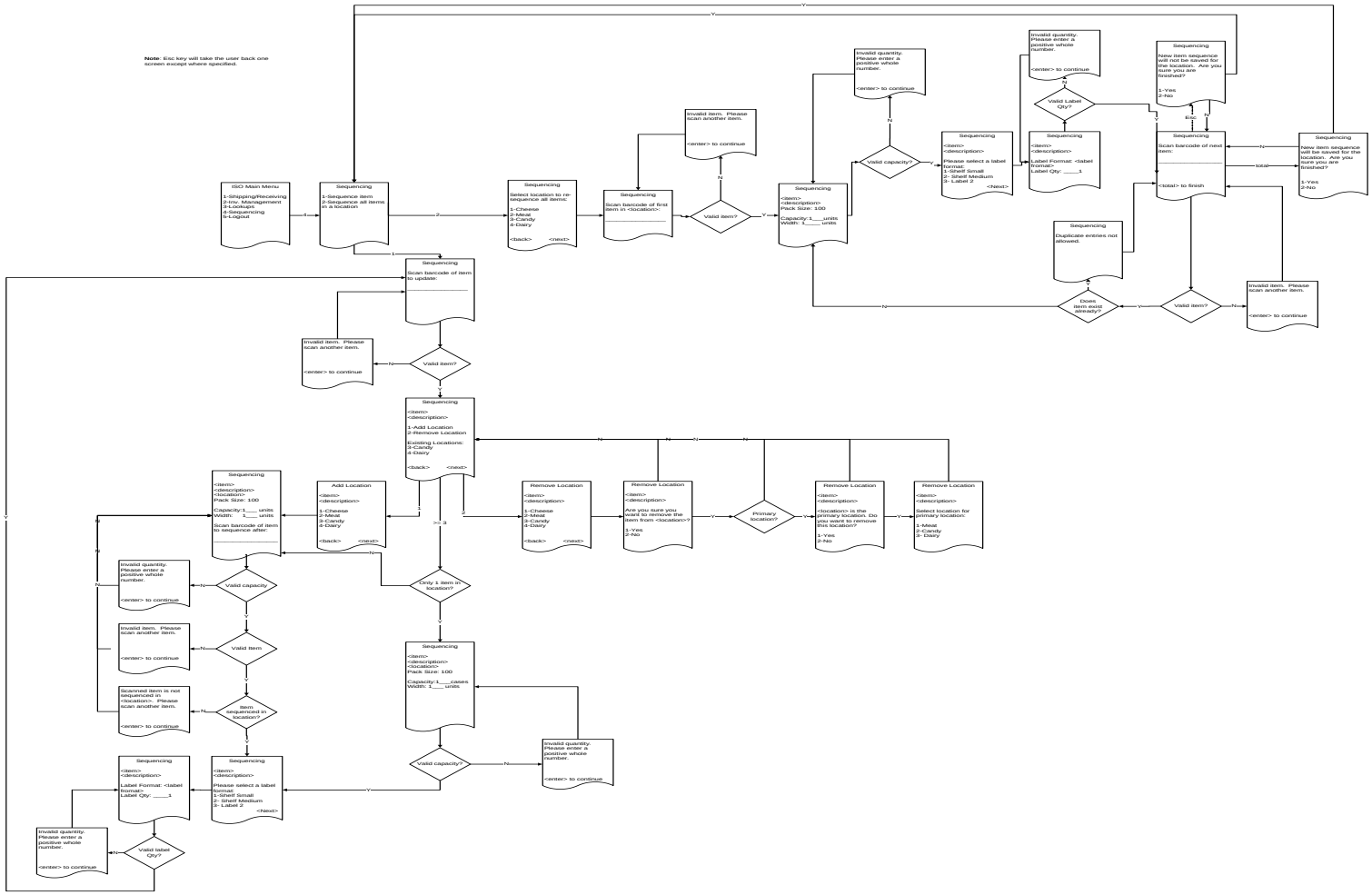
Item Lookup Handheld Workflow



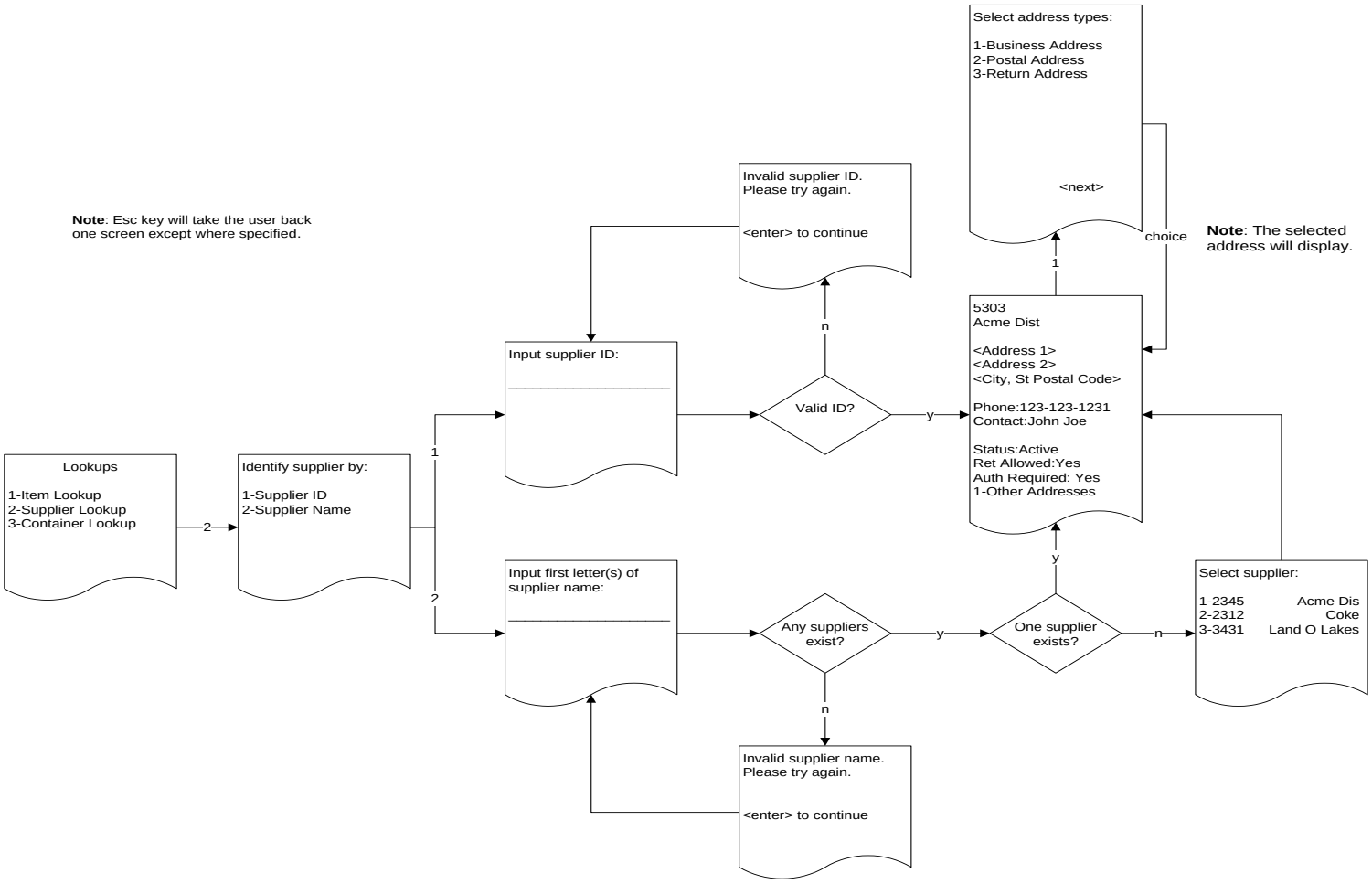
Pick List Handheld Workflow



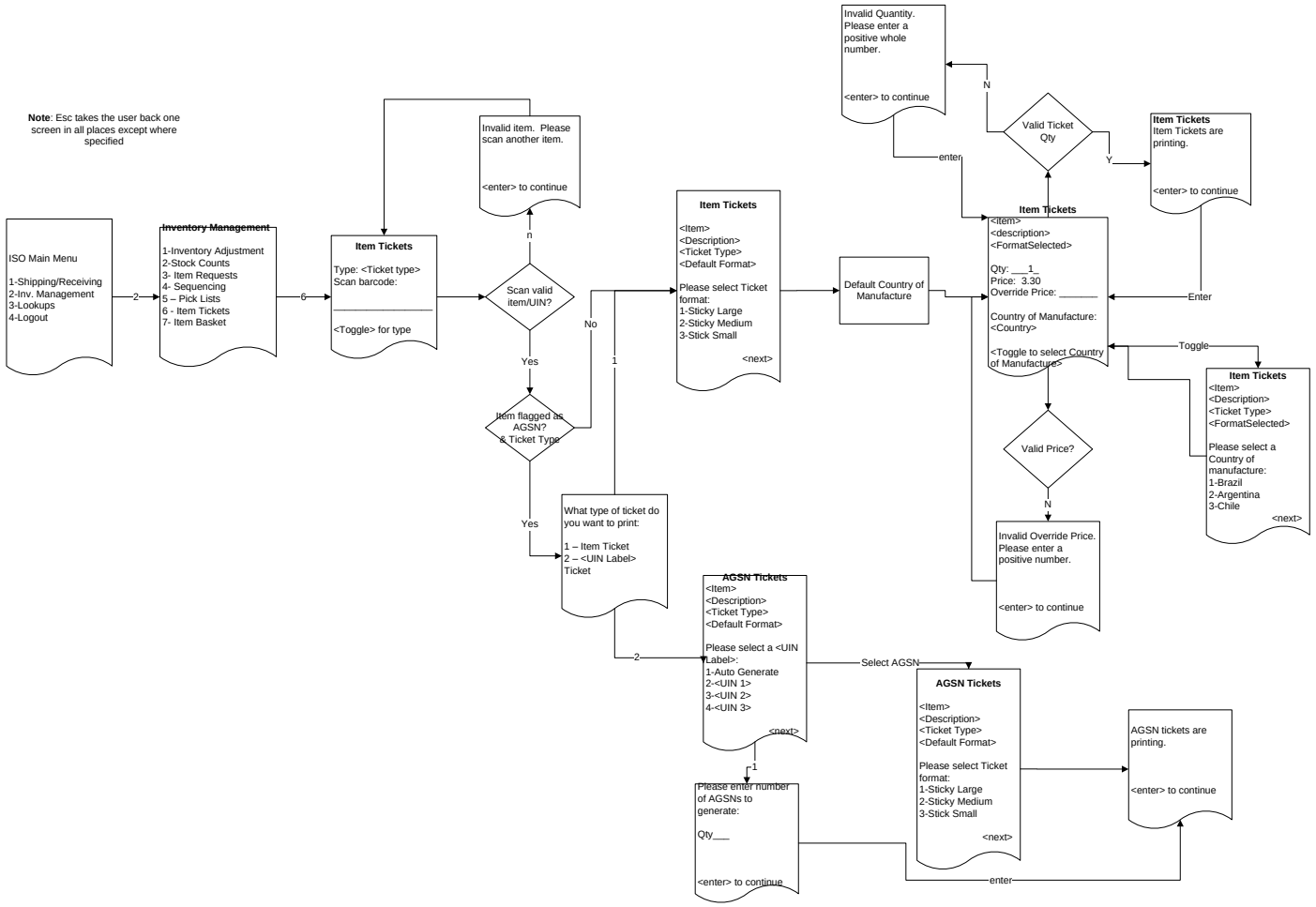
Sequencing Handheld Workflow



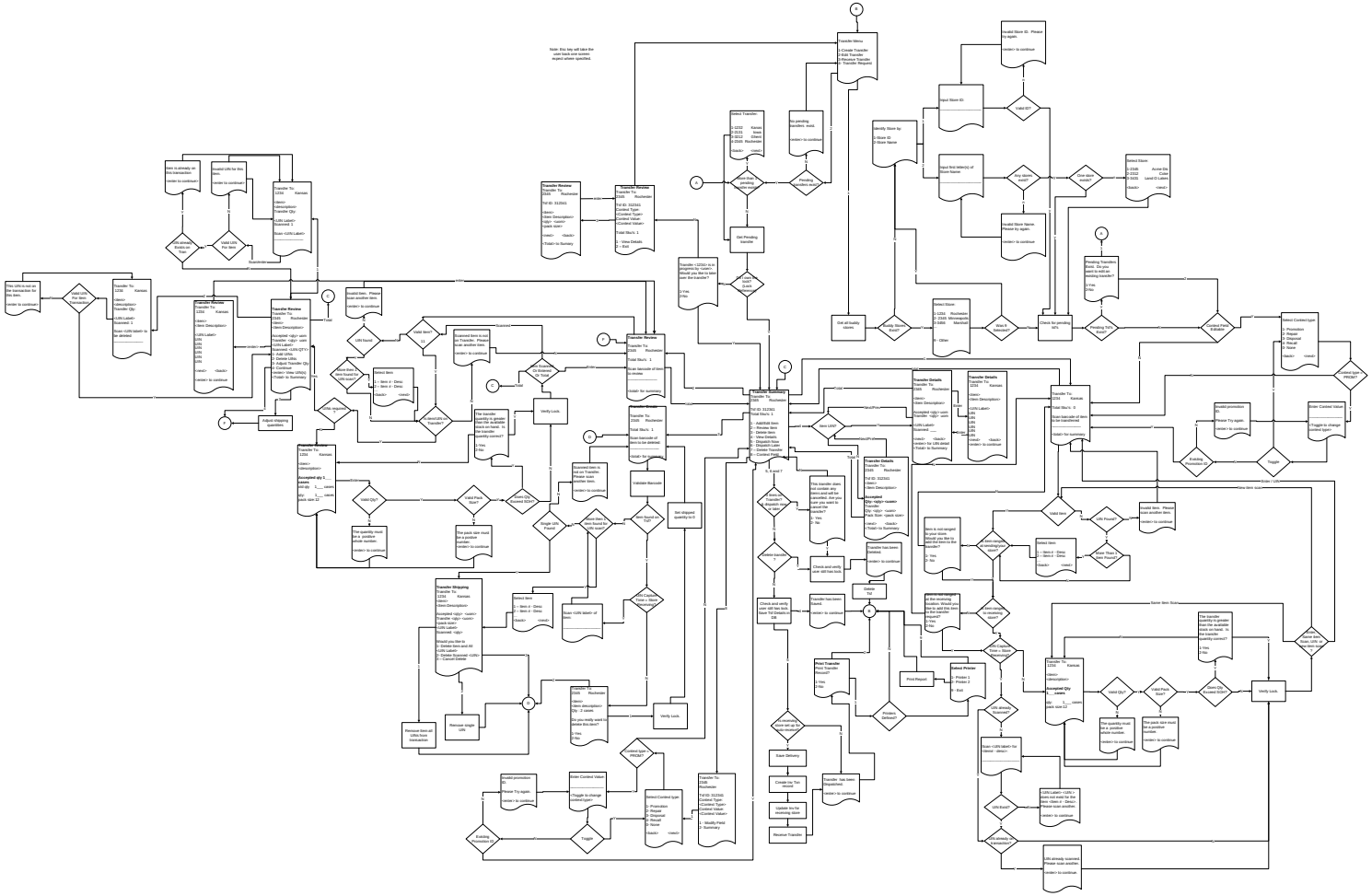
Supplier Lookup Handheld Workflow



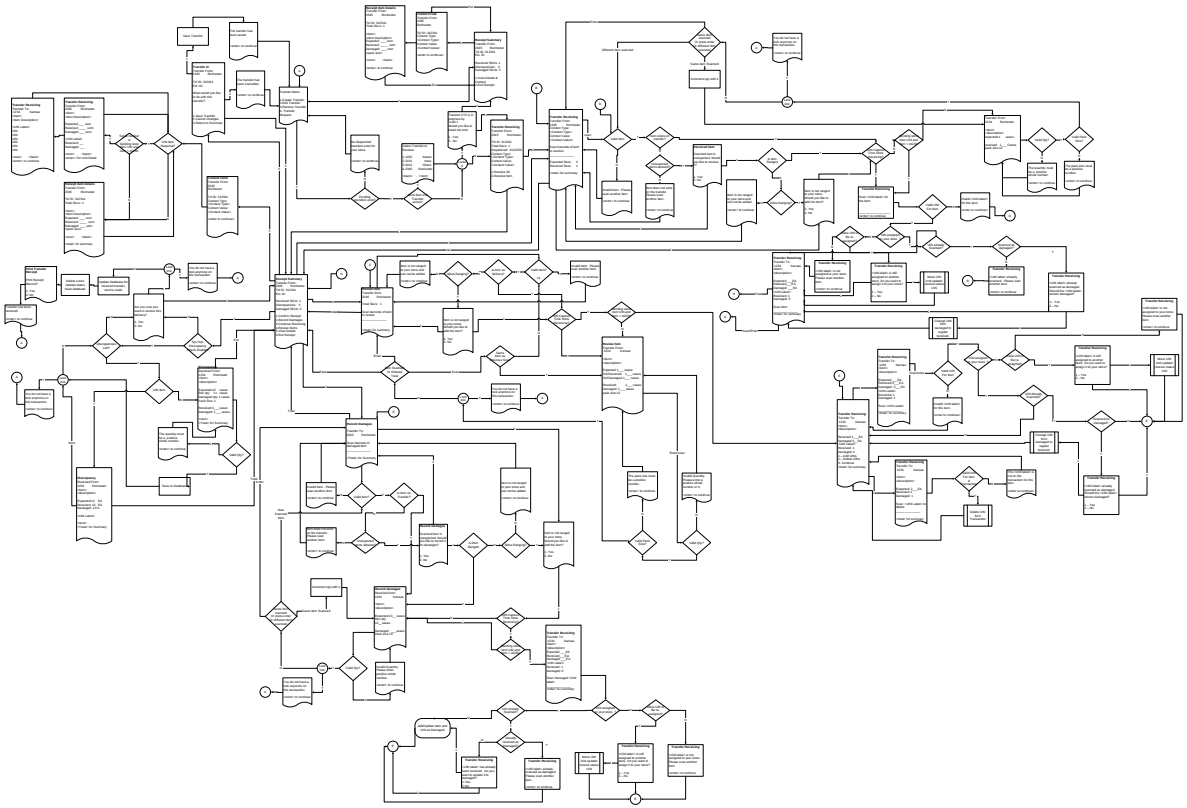
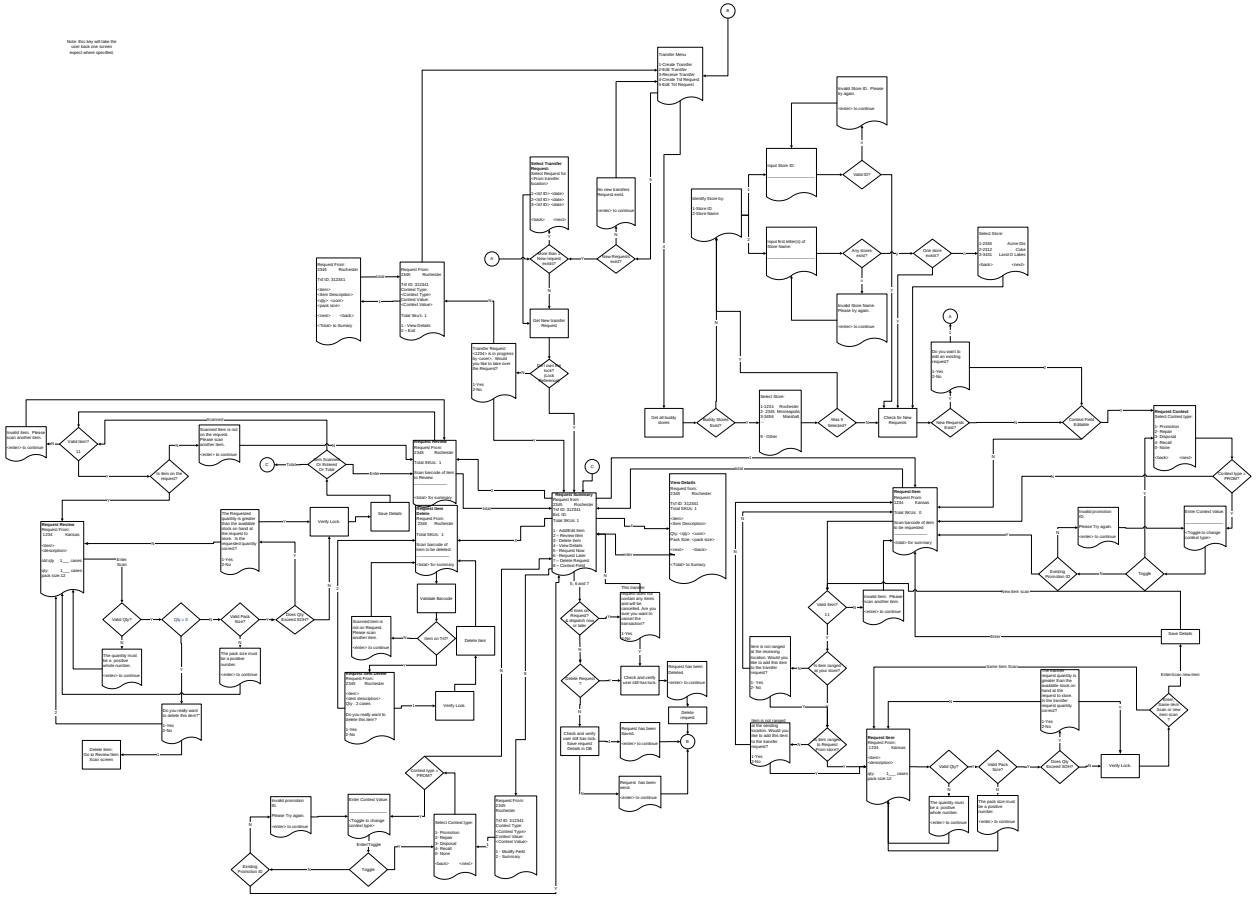
Ticketing Handheld Workflow



Transfer Create Handheld Workflow



Transfer Receiving Handheld Workflow



Transfer Request Handheld Workflow