Oracle® Retail Furniture Retail System (FRS)

Training Scenarios
Release 1101

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ORACLE

Oracle® Retail Furniture Retail System (FRS) Training Scenarios, Release 1101

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Send Us Your Comments

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Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document.

Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

> **Note:** Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the Online Documentation available on the Oracle Technology Network Web site. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: retail-doc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at www.oracle.com.

Preface

Audience

This user guide is for users and administrators of Oracle Retail Furniture Retail System (FRS). This includes merchandisers, buyers, business analysts, and administrative personnel.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Related Documents

For more information, see the following documents in the Oracle Retail Furniture Retail System (FRS) Release 1101 documentation set:

- Oracle Retail Furniture Retail System (FRS) Installation Guide
- Oracle Retail Furniture Retail System (FRS) Release Notes
- Oracle Retail Furniture Retail System (FRS) Operations Guide
- Oracle Retail Furniture Retail System (FRS) Online Help

Customer Support

- To contact Oracle Customer Support, access My Oracle Support at the following URL:
- 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, 13.3) or a later patch release (for example, 13.3.1). If you are installing the base release or additional patch releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch

releases can contain critical information related to the base release, as well as information about code changes since the base release.

Improved Process for Oracle Retail Documentation Corrections

To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times **not** be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Technology Network Web site, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

This process will prevent delays in making critical corrections available to customers. For the customer, it means that before you begin installation, you must verify that you have the most recent version of the Oracle Retail documentation set. Oracle Retail documentation is available on the Oracle Technology Network at the following URL:

http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-**02** is an updated version of a document with part number E123456-**01**.

If a more recent version of a document is available, that version supersedes all previous versions.

Oracle Retail Documentation on the Oracle Technology Network

Oracle Retail product documentation is available on the following web site:

http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html

(Data Model documents are not available through Oracle Technology Network. You can obtain them through My Oracle Support.)

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
```

Training Scenarios

Overview

This document is provided as an aid to developing your staff training and offers a series of statements for the trainee to replicate / process.

Sales Ordering

1	Create a sales order for a new customer (1). Sell one or more products buy from vendor Customer to take retailer delivery Take 50% deposit Accept the order and print the acknowledgement Make a note of the order number
2	Create a new sales for a new customer (2) Sell products from stock Customer to take retailer delivery Sell services Discount the services to zero Take payment and accept the order Record the order number
3	Create a new sales order for customer (1) Immediate sale – sell from stock only Customer 50% pay Attempt to accept order Pay remaining balance Accept order
4	Customer for order 2 returns Customer wishes to cancel Cancel the sale and give a full refund
5	New customer visits – wants a quotation for a new xxxx Generate a new order and discount the item to 75% of original cost Save as quote
6	Customer from order 5 returns Convert to sale Take payment Accept the sale Before leaving customer see's another product and asks for that to be added to the sale Add a new product to the order and take further payment

7	Customer 2 returns Wants to buy something (sell inventory) but collect it themselves from the warehouse in their own truck Pays 50% deposit Log off FRS Log in Customer returns with note and attempts to collect goods Try to quick collect before fully paid Take remaining deposit Confirm delivery

Purchasing

1	Create an order for – 10 x Entertainment Unit – cost $40 each 3 x 10 packs of Taper Candles t1 25cm Taper Candles – in three separate colours Roll of model 'ax1' carpet – length 4 by width 3.45 with a 25% purchase discount Print the order off and return to menu From the order number return to it and add Ultrasuites XC2 – three varying units Edit the order and change the receiving location / required date. Now complete the order Create the purchase orders Send the purchase orders to the vendor Edit order add a coffee table to the order and cancel the candles
2	Sell some of the goods from the order created in step 1. Accept the order Cancel the order – do not cancel the order for the stock Create a new order and sell the same stock again This time cancel the order and the stock order. Find the purchase order and check to ensure the order quantity has reduced Check the internal order ensure the quantity has reduced
3	Create sales order demand for a range of goods from differing vendor Accept the orders Via the purchasing menu find the sales order and generate purchase orders. Review the sales order to ensure the icon colour has changes. Change the purchase order quantity – buy more – check out the internal order created. Change the purchase order – cancel the line – check out the internal order/sales order Note revision numbers on audit
4	Create a sales order – use find inventory only option – choose item with no options and buy from vendor – do not take inventory. Accept order Via create purchase order – click on red inventory icon and replace unit with free to sell inventory

5	Find a purchase order linked to a sales order – acknowledge it – change expected date Review sales order – checkout date change Acknowledge a second time – change date – check out sales order Now confirm on a different date – check out sales order
6	Check out the audits available in purchasing especially the chase reports

Inventory

1	From a warehouse receive goods from a selected vendor Change the receipt quantity under and over receipting units Print a label for each item Make a note on an item that the box was damaged Print the receipt document Check out the sales orders these items were linked to – should now show green icons Find the receipt and add more goods / remove goods
2	From the GRN number only (do not use inventory id's) move the goods to individual 'bay's within the location Move multiples at once Move single items Make some units not available for sale Flag some units as damaged Flag one unit as a mark down Now create a sales order and sell one of the damaged item by searching for it by its SKU not stock ID Add in the mark down unit by searching for it by description or SKU – let the system show you the damaged unit
3	Write on goods in the showroom Print the display tag for the item Mark as not for sale/on display Sell one of the items
4	Find the damaged item from step 2 and write it off however you cannot use the new write off note option. Complete the write off You've written off the wrong item – undo the write off
5	Write on goods in the warehouse Instigate a transfer to the showroom however you cannot use the new transfer note option on the menu Print the transfer note Add more items to the note Send the note Receive the note Add more items to the note and repeat the process

6	Find a item of inventory which is sold to a customer Write on an exact duplication of it Swap the item on the sales order Now instigate the return to vendor and add the item Confirm the vendor has collected Make a note on the inventory item that the driver was reluctant to take the goods
7	You have received an invoice for goods received Process the invoice Add in the goods – the items span several purchase orders but not all item of all purchase orders are being charged for Add in freight charges and apportion the cost across the goods Accept the invoice and take an early payment discount Find the item and check to ensure the invoice number and cost are visible

Finance

1	Create a sales order an pay with three tenders – accept the sale One of the tenders was incorrectly processed – cancel it and type it in again correctly.
2	Create a sales order and part pay by customer – part by finance Do not approve finance yet. Find the order again – finance company has rejected application – cancel finance On same order now apply again – this time finance is approved Deliver goods to customer
3	Raise a report to chase for payment re order identified in step 2 Finance company pay for goods – process payment – costs you the retailer 10% of claim value Process and generate finance statement. Auditor comes in and wishes to view document – regenerate this document
4	End of day processing Cash up the 'till' drawer Process cheque, card payment 1 transaction is flagged as cheque it should be card – change it and prove the audit trail Whilst processing end of day – a late payment is entered – this payment must be included in the end of day currently being processed Complete the end of day and produce the statement The auditor now wishes to review this statement – regenerate it. A cheque has now bounced – you need to reverse the original payment effectively cancelling it
5	Customer now wishes to cancel their sale You have to refund the payment and give them the money back However retain $15 as a service charge for cancelling the order.

6	A new customer wish to purchase a sofa – they do not know which one so you can't create a sales order but they wish to leave you a $1000 deposit – take the money. The customer now returns and buys goods The customer pays using the $1000 deposit left several days ago – transfer payment on to this order

Miscellaneous

1	New sales order, selling goods from the warehouse for delivery – customer does not want delivery for 4 weeks although the item is in stock. The customer pays 50% deposit. Arrange delivery at time of order. Settle payment prior to delivery.
2	New sales order from a stock enquiry selling showroom goods. Customer to take delayed delivery. Customer changes mind buying something less expensive again from stock but to take away with them immediately.
3	New pay and take order – customer name is required however for warranty. Customer to pay a minimum deposit funding the rest by a finance company.
4	New immediate delivery order – customer returns item for full refund. Pays 50% of order balance by cash and credit card. Restocking charge of 10% to be levied. Goods are deemed to be substandard and are to be sold off at 50% of the original selling price. Goods to be put on display as damaged.
5	Purchase of marked down damaged item. Discount the order a further 10%
6	Order an item from the supplier Generate a purchase order Customer then changes mind on colour – cannot cancel original Charge customer for changing mind and re-order new product.
7	Sell item to customer and schedule delivery Customer wishes to reschedule delivery for a week later Repeat scenario once the delivery has been locked and part planned
8	Sales order – fully paid – deliver to customer via quick collect Goods then returned by the customer to the store Take the goods back but customer agrees not to take refund as they intend to buy something else in the near future
9	Customer buys an item and pays for the goods in full Customer returns a week later and buys another item but wishes to take some funds from the first order and use them as a deposit for the second order.
10	Customer orders goods and pays by check The check then bounces

11	Customer wishes to obtain a price for an item – raise a quote Customer then returns to buy the goods – take low deposit and schedule the delivery
12	Customer buys goods from the warehouse but wishes to collect them at a later date from the showroom, Use the warehouse search option to find which goods need moving where and transfer them to the correct location ready for collection Contact the customer and process the collection when the customer has forgotten to bring their sales order document.
13	Customer has a sales order but wishes to change the delivery address
14	Customer has a sales order but has recently moved house and are now wishing to have their details changed.
15	Customer orders goods, pays a deposit but then changes mind and cancels the order and requests a full refund
16	Customer orders, pays deposit and request finance, Finance company rejects application and customer decides to pay by credit card
17	Produce a finance claims report for pending delivery finance orders
18	Produce a purchase order chase report
19	Create an order for a container (3 items), once ordered create 3 sales order picking an item from the container for each one, use the acknowledgement system to revise the anticipated delivery date adding a day to the delivery time each time and ensure that this information is visible on the sales order. Book the goods in – flag 2 items as none saleable and indicate the intention to return to supplier check the order status – re order on back to back purchase orders, bring into stock and deliver.