Oracle® Retail Merchandising Foundation Cloud Service

Release Notes

Release 16.0.024

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This document highlights the major changes for Release 16.0.024 of Oracle Retail Merchandising Foundation Cloud Service.

Overview

Retailers leverage Oracle Retail Merchandising Foundation Cloud Service (RMFCS) functionality to execute core merchandising activities, including merchandise management, inventory replenishment, purchasing, import processes, sales auditing, and financial tracking. Its Trade Management module is used to manage the import process, including automating the steps necessary to import goods, managing file exchanges with trading partners, and providing a central database of critical import order information.

Merchandising Foundation Cloud Service also includes Sales Audit and Pricing modules. The Sales Audit module evaluates sales transaction from all channels, identifying any missing, duplicate, or erroneous data and highlighting any suspicious transactions, to ensure errors are resolved so that downstream systems operate off the same cleansed sales information. The Pricing module provides the ability to define, maintain, and review price changes and clearances, as well as provides the ability to pass approved price events onto downstream selling systems for execution.

Oracle Retail Cloud Services and Business Agility

Oracle Retail Foundation Cloud Service is hosted in the Oracle Cloud with the security features inherent to Oracle technology and a robust data center classification, providing significant uptime. The Oracle Cloud team is responsible for installing, monitoring, patching, and upgrading retail software.

Included in the service is continuous technical support, access to software feature enhancements, hardware upgrades, and disaster recovery. The Cloud Service model helps to free customer IT resources from the need to perform these tasks, giving retailers greater business agility to respond to changing technologies and to perform more value-added tasks focused on business processes and innovation.

Oracle Retail Software Cloud Service is acquired exclusively through a subscription service (SaaS) model. This shifts funding from a capital investment in software to an operational expense. Subscription-based pricing for retail applications offers flexibility and cost effectiveness.

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Client System Requirements

The following technology is supported:

Operating Systems

- Microsoft Windows 7
- Microsoft Windows 10

Browser Support

- Mozilla Firefox ESR 52+
- Microsoft Internet Explorer 11
- Google Chrome (Desktop) 55+

Functional Enhancement

The functional enhancements below are included in this release.

Introduction of Promotions and Offers

This release introduces promotion and offer capabilities in the RMFCS Pricing module. Promotions are a grouping of offers that detail temporary discounts to be given on customer purchases in a particular timeframe. Offers are defined by applying templates that guide the user to specify the conditions under which the customer's purchase would qualify for a reward, as well as the reward itself. Several types of offer templates are provided in this release:

Item-level Discounts

Discount	Description
Get Y for Discount	This template is used to define a simple item level discount that will be applied to the defined reward items that are included.
	Example: 25% off all women's shoes

Transaction-level Discount

Discount	Description
Get Discount	This template is used to define a simple discount that is applied to a customer's transaction. In this case all items on a customer's purchase are discounted, unless exclusions are added as part of the offer definition. Example: $10 off all in-store purchases
Buy X, Get Discount	This type of offer consists of a set of qualifier items, with a quantity that must be purchased from the list to get the discount. Similar to the Get Discount template, certain items can also be excluded from the transaction level discount, if desired. Example: Buy 2 gallons of paint, get 10% off purchase
Spend X, Get Discount	This type of offer consists of a set of qualifier items, with an amount that must be purchased from the list to get the discount. Like the other transaction-level templates, certain items can also be excluded from the transaction level discount, if desired. Example: Spend $100, get $10 off purchase

Similar to price changes and clearance, promotions will support a two-level approval process, as well as a cancellation process that supports the cancellation of items, stores, or the whole offer.

Prior to the start date of the offers, promotions are interfaced to the selling solutions in order to be applied to a customer's in-store or online purchases. Cancellations and any other updates that occur during the lifecycle of the offers are similarly communicated.

Clearance Enhancements

The clearance workflow has been enhanced in this release to add a new way to add markdowns. In previous releases, the only method of creating clearances was via the Quick Create panel. However, in this release, a new creation wizard has been added in the Clearance Group workflow that allows more flexibility in selecting items and locations to be included, as well as visibility into the impact of the markdown prior to applying the markdowns to the group.

Additionally, the markdown number that was included in the initial clearance functionality has been enhanced to be a list of values that the user can select from

when creating a markdown to ensure consistency in the assigned values to better accommodate reporting.

Item Location Delete

In previous releases, the ability to delete an item/location in RMFCS was not supported. The status of the item/location could only be updated to "Delete". The system only supported deleting item/location relationships when the item itself was deleted.

In this release, a separate item/location delete process has been added to allow selective item/locations to be removed from RMFCS. This process functions similarly to the deletion of items, in that item/location combinations are flagged for delete, and then a batch process validates whether it can be removed and, if so, deleted. Any errors that are found in the validation step are made visible to users in the Inactive Item/Locations report, as described below in the Operational Insights section.

Enhancements Operational Insights

Several new enhancements were made to add new operational insights to RMFCS, including the addition of a new dashboard, new dashboard reports, and new in-context reports.

New Dashboard

A new dashboard was added in the RMFCS Pricing functionality targeted at the Pricing Analyst or Manager role in a retail organization. As with other role-based dashboards in RMFCS, this new dashboard is intended to provide the pricing analysts visibility to key events or exceptions in their area of responsibility to help make them more efficient in their job. This dashboard contains two reports: Price Changes Pending Approval and Clearance Markdowns Pending Approval. In each of these reports, the pricing analyst is shown price events that are due to go into effect in the next week that have not yet been approved, with special emphasis on those that may already be overdue getting to the store or other selling channels or have issues that require conflict resolution. The pricing analyst is able to quickly take action from the dashboard to resolve issues for both price types.

New Dashboard Reports

New dashboard reports were also added to the Data Steward dashboard in RMFCS. These reports are focused on identifying potential item and item location candidates for delete based on inactivity, such as lack of sales or inventory, and provide visibility items and item/locations that could not be deleted due to conflicts.

Details on the issues encountered are also made available in the report to facilitate the issue resolution process.

New In-context Report

Several new in-context reports were also added to RMFCS in this release. These reports are intended to provide additional contextual information to the user to aid in decision making within a workflow

Item Image   This report shows just the image of the item in the Item Image workflow to help the user to validate that the link has been created correctly for the image. Previously, this validation could be performed only by clicking a button which launched a separate browser window for each image added.

Price Summary This report provides information about the highlighted item/location in a price change group or clearance group about the current price and cost of the item/location, including the current price, whether it is on clearance, margin, and the next approved price change or markdown event. This can help the pricing analyst or manage validate that the price event has been created correctly before approving.

Inventory Summary Similar to the Price Summary report, this report also is shown in the Price Change Group and Clearance Group workflows to help provide some context to the user on approving events. In this case, the report shows a summary of on order, on hand, and in transit for the item or item location to help the user assess the size of the markdown or markup.

4-6-4 Calendar Support

For retailers that run RMFCS using a weekly retail (4-5-4) calendar, more flexibility has been added for how to address the extra week added to the calendar every 7 years. Previous releases only allowed for the extra week to be added to a 4 week period, sometimes referred to as a 4-5-5 approach. With this release, retailers will also have the option of adding the extra week to a 5 week period, referred to as a 4-6-4 approach. This provides a retailer with different options for managing these weeks and making year to year comparisons.

Replenishment Attribute Upload

A new upload process for managing item replenishment attributes has been added to RMFCS to allow retailers to integrate replenishment attributes from external sources such as a replenishment optimization application, or even using spreadsheets. Attributes can be uploaded to activate, update or deactivate item/location combinations in any replenishment method supported by RMFCS.

Item HTS Induction

The existing item induction capability was enhanced to support the association of HTS codes and assessments with items. This reduces the effort involved in a traditionally very data-intensive process and will also facilitate the integration when the information is being mastered in another application. Similar to other item attributes that can be managed via induction, these attributes support configuration in the templating and can be staged prior to uploading into RMFCS.

Sales Audit Enhancements

The enhancements below are included in this release.

Transaction-level Locking

In previous releases, Sales Audit supported locking at a store day level only. However, when multiple auditors were needed to correct sales data during a peak volume period, this limited the auditing team's efficiency and flexibility. With this release, a system option has been introduced to allow retailers to define how they want to manage their auditing workload, at the transaction or store day level.

Re-open Store Days

A new function was added in Sales Audit to support the re-opening of a closed store day. This feature facilitates corrections to a day when further corrections are required or new transactions are received after the day was initially closed.

Realms

Several new tables were added to the Sales Audit Realms store to support building additional audit rules and totals, including areas, store hierarchy, and the department CFAS extension table.

Credit Card Tokens

A new field was added in the integration software and in Sales Audit to store the credit card token if passed in from the selling solutions. This is stored for informational purposes only.

Original Transaction Date

In this release, functionality was added to allow subtotaling using the original transaction date from the point-of-sale system (POS) or the order management system (OMS) to create totals and GL mappings within a Store Day.

Re-apply Rules by Transaction

Functionality was also added to allow Sales Audit rules to be reapplied for a particular transaction after corrections had been made to validate updates, rather than waiting on the store day level re-audit to be completed.

Returns Management

In order to support customer returns reporting and analysis, a new input has been added to the RTLOG import that will allow retailers to track the original selling store on a return transaction. This, combined with the original transaction ID, will be included in exports from Sales Audit to Retail Insights for returns analysis reporting.

Other Notable Enhancements

This section outlines some other notable enhancements that were included in RMFCS in this release.

Item Delete Privilege

A new privilege was added as part of the Item Management duty to separate the privilege for deleting an item from the Maintain Items privilege that was available in previous releases. This enhancement provides retailers more flexibility in configuring certain users to be able to update items, but retains the ability to delete limited to a smaller group of users, if desired.

Order Expenses Exchange Rate

A new system option was added to determine whether or not expenses on an order should be recalculated based on the receipt date or the exchange rate defined on the purchase order. This provides more flexibility in partner agreements, especially when dealing in regions with large fluctuations in currency valuation.

Ordering Usability Enhancements

Two enhancements were added in the purchase order workflow in RMFCS to provide more flexibility and efficiency for users. The first is the ability to search for a purchase order using an item parent (a style); in addition to a transaction item (a SKU). The second enhancement allows users who have privileges to approve orders, approve them directly without first requiring an order be submitted. This ability was supported in other workflows in previous releases, but it has now has been added to the main purchasing workflow.

Data Loading Filtering

Filters have been added to the data download capability for some of the larger foundational data sets managed in RMFCS to support extracting just a subset of the data for update. This includes the following entities: Competitive Prices, GL Cross Reference, Half Data Control, Harmonized Tariff Schedule (HTS), Monthly Budget, Open to Buy, and Supplier Availability.

Allocation Inventory Validation

A new system option was added to allow retailers to choose to bypass inventory validation on allocations uploaded from an external system into Merchandising. This would allow allocations to be sent to the warehouse without first requiring error correction. The warehouse would then be responsible for determining the proration of inventory if fewer units were available than requested and for canceling any outstanding allocated quantity that could not be fulfilled.

Technical Enhancements

The technical enhancements below are included in this release.

Dashboard and Contextual Reports

Enhancements have been made in RMFCS to support the configuration of dashboard reports and in-context reports by a customer application administrator. This enhancement allows reports to be added, removed, or the order of display changed in both the dashboard and the contextual pane of the relevant screens.

Task List Links

Functionality was added to allow the application administrator to configure the task links available to all users of the cloud service. For example, if no users were using the Buyer Worksheet functionality, this link in the task list could be configured off, rather than requiring the adjustments of privileges for each role.

Induction Template Configuration

Another configuration enhancement was to support the configuration of induction templates in a new workflow screen. This enhancement allows customer users of RMFCS to copy the base templates for item, purchase order (PO), cost change, and replenishment and to configure the system to their specific business by hiding certain columns, updating descriptions for column and tab titles, and specifying default values.

Dashboard System Options

The RMFCS dashboard reports have several system and department level configurations that can be used to control the information displayed in the reports, the criticality reflected in the tiles, and other key aspects of the reports. In this release, these options were added to a new workflow in RMFCS to allow for the online management and configuration of the dashboard reports.

CFAS Activation

For customers of RMFCS using custom flex attributes, or CFAS, activating new attributes required the system administrator to run a script on their behalf whenever changes were needed. To make this functionality more self-service, an enhancement has been made to allow CFAS attributes to be activated online, rather than via the backend process.

Customer Configuration Preservation

Several enhancements were made to ensure that any customer configurations made to the application were preserved when patches are applied to RMFCS. This included enhancements to the security policy setup, RMFCS codes, inventory status types and codes, and POS tender types.

Purge/Archive

As part of this release, several of the purge batch programs were re-factored to support archiving of data in addition to purging from the system of record tables in RMFCS. These programs, which will be capable of being scheduled to run throughout the day, will stage data to temporary tables prior to purging from the system of record tables, and then an end of day archiving process will create dump files from the temporary tables that can be sent via SFTP to a customer location for archiving.

Integration Enhancement

The integration enhancements below are included in this release.

Bulk Integrations

A number of new bulk data integrations (or BDI) have been added to RMFCS in this release to support the integration of larger data sets. The primary purpose of these is to support the Oracle Retail Store Inventory Management (SIM) data seeding process, but they can be used for other cloud or on premise integrations as well. These integrations cover the following areas in RMFCS:

- Code Header and Detail
- UDAs and Values
- Item
- Pack Item
- Item Free Form UDAs
- Item LOV UDAs
- Item Date UDAs

- Item Supplier

- Item Supplier Country

- Item Supplier Manufacturing Country

- Item Supplier Country Dimensions

- Unit of Measure (UOM) Class

- Item Supplier UOM

- UOM Conversion

- Supplier and Address

- Finishers and Address

- Warehouse and Address

- Item Images

- Replenishment Item/Location

- Delivery Slots

- Organizational Hierarchy

- Price History

New Web Services

Several new web services have also been introduced as part of this release to make it easier for external systems, cloud or on premise, to communicate with RMFCS. These include both SOAP services that support request/response integration, as well as REST query APIs.

SOAP Services

The subscription APIs used by RMS for Item, Purchase Order, and Allocation were previously available only as RIB objects, but have now been service enabled to support sending a response back, including error details when applicable.

REST Services

The REST services have been added to allow external systems to query data in RMS in the following areas:

- Item details

- Reclass details

- Merchandise hierarchy

- Supplier details

- Warehouse details

- Store details

- Diffs

- Current system date (vdate)

- Currency Rates

- Codes

- Orders details

- Transfer details

- Allocation details

- VAT details

- Stock Count details

- Item/Location inventory

- Shipments for a distro or PO

CFAS Integration

In previous releases, CFAS integration was only supported in some inbound integrations, but was not supported in any outbound integrations from RMFCS. In order to make the platform more flexible and for customers to be able to leverage the CFAS attributes in other applications or reporting, changes were made to outbound and inbound integrations via the Oracle Retail Integration Bus (RIB) in the following areas:

Publishing	Subscribing
- Item	- Item
- Item Supplier	- Item Supplier
- Item Supplier Country	- Item Supplier Country
- Item Location	- Item Location
- Order Header	- Order Header
- Order Item	- Order Item
- Order Item Location	- Order Item Location
- Supplier & Address	- Supplier & Address
- Store & Address	- Store & Address
- Warehouse & Address	- Transfer Header
- Partner & Address	- RTV Header
- Transfer Header	- Diff Type
- RTV Header	- Department, Class & Subclass
- Diff Type	- ELC Components
- Department, Class & Subclass	- VAT Codes
	- Cost Change

Known Issues

The known issues described below remain in this release.

Known Issue/Defect	Defect Number
Approved promotional offers are intended to be sent to selling solutions x days prior to their start date based on the Price Event Pending Days system parameter. However, in some cases they are being sent in advance of that date.	27291623
When an unexpected item is received on a transfer, the in transit quantity in RMS is being decremented incorrectly for the unexpected item.	27265898

Related Documentation

For more information, see the following documents in the Oracle Retail Foundation Cloud Service 16.0.024 documentation set:

- *Oracle Retail Merchandising Cloud Services Implementation Guide*

- *Oracle Retail Merchandising Cloud Services Administration Guide*

- *Oracle Retail Merchandising Cloud Services Administrator Action List*

- *Oracle Retail Merchandising System Operations Guide - Volume 1 - Batch Overviews and Designs*

- *Oracle Retail Merchandising System Operations Guide - Volume 2 - Message Publication and Subscription Designs*

- *Oracle Retail Merchandising System (RMS) User Guide*

- *Oracle Retail Merchandising Cloud Services Batch Schedule*

- *Oracle Retail Merchandising System (RMS) Reports User Guide*

- *Oracle Retail Pricing Reports User Guide*

- *Oracle Retail Process Orchestration and Monitoring Guide*

- *Oracle Retail Sales Audit (ReSA) User Guide*

- *Oracle Retail Custom Flex Attribute Solution Implementation Guide*

- *Oracle Retail Xstore Suite Merchandising Implementation Guide*

Supplemental Documentation on My Oracle Support

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Value-Added Reseller (VAR) Language

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