Retail Merchandising Foundation Cloud Service Franchise User Guide, Release 16.0.030

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Retail Merchandising Foundation Cloud Service Franchise User Guide, Release 16.0.030

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- 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?

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Preface

This document describes the Merchandising Foundation Cloud Service user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

Audience

This document is for users and administrators of Oracle Retail Product. 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.

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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, 16.0) or a later patch release (for example, 16.0.028). If you are installing the base release, 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.

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

The following text conventions are used in this document:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.</td>
</tr>
<tr>
<td><em>italic</em></td>
<td>Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.</td>
</tr>
<tr>
<td>Convention</td>
<td>Meaning</td>
</tr>
<tr>
<td>------------</td>
<td>---------</td>
</tr>
<tr>
<td>monospace</td>
<td>Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.</td>
</tr>
</tbody>
</table>
The franchise business model is typically used by retailers to scale up business operations and market presence, particularly in new markets. In this model, retailers may choose to utilize business partners called franchisees to manage branded or co-branded stores while retaining the retailer’s business processes and value proposition. Franchisees may operate one or more stores under the retailer’s banner. Franchise models can vary by geography, ease of market entry and line of business. There can also be variances in mode of profiting sharing (license fee vs % of profits vs preferential rates), inventory management (franchisee managed as opposed to franchiser managed), and so on. The Merchandising system supports a franchise model that offers customer management, franchise costing and both retailer-managed as well as franchisee-managed inventory capabilities. A comprehensive description of the Franchise Management features available in Merchandising can be found in the Franchise Management whitepaper.
Manage Franchise Customers

Franchise Customers are typically business entities who manage branded or co-branded stores with the retailer, while retaining the retailer’s business processes and value propositions. Each franchise customer can operate one or more stores for the retailer for which inventory may or may not be managed by the retailer. These franchise locations are set up as stores in Merchandising to ease the process of ordering and fulfilling of franchise orders. Merchandising maintains customer groups and customers pertaining to franchise operations as a hierarchy above the franchise locations, which are created as stores.

Franchise customer groups provide the ability to group customers owned by a larger group. If you do not have a multi-tiered structure for your franchise customers, then customer and customer groups can be created as a one-to-one relationship. Customer groups can also be used as a grouping mechanism while defining cost-build-up templates for uniformity in costing. Definition of franchise customer groups is mandatory to set up franchise customers in Merchandising.

Once a customer group is defined, customers belonging the customer group can be set up in the Merchandising system. Multiple customers can be associated under a single customer group, but a given customer can only belong to a single customer group.

Franchise customers and customer groups can be created and managed using the spreadsheet download and upload processes, which are accessed through the main Merchandising task list under Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data respectively. Navigate to Foundation Data > Download Foundation Data, choose the Template Type of Franchise and the Template titled Franchise Customers to download existing customer data.

Add a Franchise Customer Group

To add a new franchise customer group, start in the Franchise Customer Group tab. Add a new row by selecting the action type of Create and enter the ID for the new group that you wish to add, using up to 10 numeric digits. Next proceed to enter the Franchise Customer Group Name. Translations of the Customer Group Name can be defined in the Franchise Customer Group translations tab. For each new language in which a translation is to be defined, add a row with an action type of Create, select the language code and enter the customer Group ID for which the translation is being defined together with the translated name. There are no significant validations for uploading a new Franchise Group apart from validating that the Customer Group ID is unique.
Add a Franchise Customer

To add a new franchise customer, start in the Franchise Customer tab. Add a new row by selecting the action type of Create and enter the ID for the new customer that you wish to add, using up to 10 numeric digits. Next proceed to enter the Franchise Customer Name. Other key details that you will need to enter include:

- Credit indicator - Indicate whether the Franchise Customer has good credit. Franchise Ordering will be restricted for Customers with poor credit. Valid values are Yes and No.
- Customer Group ID - Enter the ID of a valid Franchise Customer Group to which the customer is associated.
- Auto Approve Indicator - Indicates if externally uploaded Franchise Orders should be automatically approved for this customer or not. Valid values are Yes and No.

Translations of the Customer Name can be defined in the Franchise Customer translations tab. For each new language in which a translation is to be defined, add a row with an action type of Create carrying the language code and the customer ID for which the translation is being defined together with the translated name. There are no significant validations for uploading a new Franchise customer apart from validating that the customer is unique and associated with a valid Franchise Customer Group.

Update Franchise Customers and Franchise Customer Groups

If you would like to update any Customer or Customer Group details, a similar process will be followed as described above for creating new Franchise Customer Groups. First, download the Franchise Customer spreadsheet, and then navigate to the tab where you would like to make your updates. The following columns can be updated in each tab:

- Franchise Customer Groups – Customer Group Name
- Franchise Customer Groups Translation – Customer Group Name
- Franchise Customers – Customer Name, Credit Indicator, Customer Group ID, Auto Approve Indicator
- Franchise Customer Translations – Customer Name

In the tab where you are going to make your updates, select the action type of Update on rows that you wish to update and then correct the value in the spreadsheet. Once your updates are complete, save and close the spreadsheet.

Delete Franchise Customers and Franchise Customer Groups

If you wish to delete a Franchise Customer Group or Franchise Customer or its associated translation record because it is not used by your business, update the action column to select Delete for those rows in each of the tabs where it occurs. This includes Franchise Customer Groups, Franchise Customers and their respective translation tables. Care should be taken before deleting a Franchise Customer or Franchise Customer group to ensure that it is not used and does not have active transactions referencing it in the system. If associated records exist then an error could be raised on upload.
Upload Changes

For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and select Foundation Data > Upload Foundation Data from the main task list. In this screen, you’ll again select the template type Franchise and the template Franchise Customers. This will generate a process description automatically, but this can be updated if desired. Lastly, you’ll select the Browse button and navigate to the directory where you saved the updated spreadsheet.

To review the status of the upload and check whether any errors occurred, select the Foundation Data > Review Status task from the main task list. For more information, see “View Data Loading Status” in the Oracle Retail Merchandising Do the Basics User Guide.
The Franchise Cost Template is used to apply the same pricing concept to multiple item/franchisee location combinations. Each template defines the method by which costing for the Franchisee will be calculated. The Franchise Cost Templates page allows you to view, edit, or create cost templates used to determine customer costs for franchise.

The following template types are available:
- Margin then Up Charges
- Up Charges then Margin
- Percent off Retail
- Fixed Cost

*Figure 3–1  Franchise Cost Template Page*
Template

The Template section contains the template ID that is automatically generated. Depending on the calculation type selected, the section contains the following fields. The system defaults to the Margin then to the Up Charges type.

Table 3–1 Template - Fields and Description

<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Enter a description. This field is a required field.</td>
</tr>
<tr>
<td>Translate icon</td>
<td>You can create a translation by using the Translate icon 📇.</td>
</tr>
<tr>
<td>Type</td>
<td>Select the method by which the costing will be calculated. The following template types are available:</td>
</tr>
<tr>
<td>Margin Percent</td>
<td>Only available if you select one of the following template types:</td>
</tr>
<tr>
<td>Percent Off Retail</td>
<td>Only available if you select the template type Percent Off Retail. Enter the percent off retail used to calculate the customer cost for an item. This field is a required field.</td>
</tr>
<tr>
<td>Fixed Cost</td>
<td>Only available if you select the template type Fixed Cost. Enter the fixed cost. This field is a required field.</td>
</tr>
<tr>
<td>Final Cost checkbox</td>
<td>Only available if you select the template type Fixed Cost. You can define the final customer cost for an item. Select the Final Cost check box. The Final Cost option signifies if this is the final cost for the item/franchise location or deal pass through will have to be applied on the cost to derive the final customer cost for the item/franchise location.</td>
</tr>
</tbody>
</table>

Up Charges

The Up Charges section contains the list of up charges associated with the template. This section is only available when the template type is either Margin then Up Charges or Up Charges then Margin. You can add new up-charges or delete existing up-charges from the template in this section.

Create a Franchise Cost Template

To create a franchise cost template, follow the steps below.
1. From the Tasks menu, select **Inventory > Franchise Orders > Create Cost Template**. The Franchise Cost Template page appears.

2. Enter the required fields.

3. Then choose one of the following options.
   - Click **Save** to save the franchise cost template.
   - Click **Save and Close** to save the template and close the page.
   - Click **Cancel** to reject all entries and close the page.

### Add Up Charges to a Franchise Cost Template

To add up charges to a franchise cost template, follow the steps below. This section is only available when the template type is either **Margin then Up Charges** or **Up Charges then Margin**.

1. In the Up Charges section, select **Actions > Add**, or use the Add icon †. The Add Up Charges pop-up appears.

2. In the **Up Charges** field, enter, select or search for the up charge you want to add to the template. This field is a required field.

3. Then choose one of the following options.
   - Click **OK** to add the up charge and close the pop-up.
   - Click **OK and Add Another** to add additional up charges
   - Click **Cancel** to reject all entries and close the pop-up.

### Manage a Cost Template

The Manage Cost Template option opens the Franchise Cost Template Search page. In this page you can perform the following actions.

- Search for cost templates by various search criteria
- View search results
- View cost template information
- Create cost templates
- Edit cost templates
- Export Query Results to Excel

You can access the Franchise Cost Template Search page from the Task menu, select **Inventory > Franchise Orders > Manage Cost Template**. The Franchise Cost Template Search page appears.
Search for a Franchise Cost Template

To search for a franchise cost template:

1. From the Task menu, select **Inventory > Franchise Orders > Manage Cost Templates**. The Franchise Cost Template Search page appears.

2. You can search for a franchise cost template using basic or advanced search criteria, depending on the requirement. The basic mode is the default search mode.
   - Click **Advanced** to access the search section in advanced mode.
   - Click **Basic** to return to basic mode.

Search for a Franchise Cost Template Through the Basic Search Criteria

To search for a franchise cost template using basic search criteria:

1. Enter, select or search for one or all of the following basic search criteria.

   | Table 3–2 Franchise Cost Template Search - Basic Search Criteria and Description |
   |-------------------------------|-----------------------------------|
   | **Fields**                    | **Description**                   |
   | Match option                  | Check radio button All or Any.    |
   |                               | All - only franchise cost templates matching all entered search criteria are shown. |
   |                               | Any - franchise cost templates matching any of the entered search criteria are shown. |
   | Template                      | Enter the template ID.            |
   | Description                   | Enter the template description.   |
   | Template Type                 | Select the template type from the list. |
Table 3–2 (Cont.) Franchise Cost Template Search - Basic Search Criteria and Fields

<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Margin Percent</td>
<td>Enter the margin in percent.</td>
</tr>
</tbody>
</table>

2. Click **Search**. The franchise cost templates that match the search criteria are displayed in the Results section.

3. Click **Reset** to clear the search section and results.

4. Click **Done** to close the page.

Search for a Franchise Cost Template through Advanced Search Criteria

To search for a franchise cost template using advanced search criteria:

1. To search using advanced search criteria, enter or select one or all of the advanced search criteria.

2. To narrow down the search, use the list next to the search fields. For example, determine if the entered value should equal or not equal the search result.

3. Click **Search**. The franchise cost templates that match the search criteria are displayed in the Results section.

4. Click **Reset** to clear the search section and results.

5. Click **Add Fields** to add more fields for the advanced search. To remove the field from the search, click the x right next to the field.

6. Click **Done** to close the page.

Edit a Franchise Cost Template

To edit a franchise cost template, follow the steps below.

1. From the Tasks menu, select **Inventory > Franchise Orders > Manage Cost Template**. The Franchise Cost Template Search page appears.

2. Enter or select search criteria to make the search more restrictive.

3. Click **Search**. The franchise cost templates that match the search criteria are displayed in the Results section.

4. Select a franchise cost template in the Results section.

5. Then select **Actions > Edit**, or use the Edit icon, or click on the template link. The Franchise Cost Template page appears.

6. Edit the information in the individual sections.

   For more information about the available sections of the Franchise Cost Template page, see the Manage Franchise Costs section.

7. Then choose one of the following options.
   - Click **Save** to save your changes.
   - Click **Save and Close** to save your changes and close the page.
   - Click **Cancel** to reject all entries and close the page.
Franchise Cost Relationships

The Franchise Cost Relationships page allows you to maintain the franchise cost relationships between departments/items and locations.

Figure 3–3 Franchise Cost Relationships

The table contains the cost templates associated with a department/class/subclass or item for one or more franchise stores. You can only associate an item with a template if the selected template uses the fixed cost pricing method. These relationships, which also include start and end dates, are used to calculate the pricing cost for franchise stores.

Add Cost Relationships

To add cost relationships, follow the steps below.

1. From the Tasks menu, select Inventory > Franchise Orders > Cost Relationships. The Franchise Cost Relationships page appears.

2. In the table, select Actions > Add, or use the Add icon +. The Add Relationships pop-up appears.
Franchise Cost Relationships

Figure 3–4  Add Relationship Pop-Up

a. In the Template field, enter, select or search for the template. This field is a required field.
b. In the Department field, enter, select or search for the department you want to associate the template with. This field is a required field.
c. In the Class field, enter, select or search for the class.
d. In the Subclass field, enter, select or search for the subclass.
e. In the Location field, select the location type from the list. Then enter, select or search for the location. This field is a required field.
f. In the Start Date field, enter the start date or use the Calendar icon to select a date. This field is a required field.
g. In the End Date field, enter the end date or use the Calendar icon to select a date. This field is a required field.
h. Then choose one of the following options.
   - Click OK to add the cost relationship to the table and close the pop-up.
   - Click OK and Add Another to add additional cost relationships.
   - Click Cancel to reject all entries and close the pop-up.

Edit Cost Relationships

To edit cost relationships, follow the steps below.

1. From the Tasks menu, select Inventory > Franchise Orders > Cost Relationships. The Franchise Cost Relationships page appears.
2. Select a record in the table.
3. Then select Actions > Edit, or use the Edit icon . The Edit Relationships pop-up appears. The start and end date of the selected template are displayed.

Figure 3–5  Edit Relationship Pop-Up
Manage Deal Pass Through

Suppliers often provide off-invoice deals to promote purchases by retailers. These purchase related benefits can be further passed through from the retailer to the franchise customer. The retailer may opt to pass through a full or a partial benefit to the franchise customer. The Merchandising system provides an option to define this deal pass-through percentage by department/supplier/costing location for each franchise store. The diagram below depicts a simple example of how this pass through percentage is calculated and applied.

Deal pass through percentages can be defined and managed using the spreadsheet download and upload processes, which are accessed through the main Merchandising task list under Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data respectively. Navigate to Foundation Data > Download Foundation Data, choose the Template Type of Franchise and the Template titled Deal Pass Through to download existing pass through data.

Add a Deal Pass Through Definition

To add a new Deal Pass through definition, start in the Deal Pass Through tab. Add a new row by selecting the action type of Create and enter the department, supplier, costing location and location combination for which the deal pass through is being defined and the pass through percentage applicable for deals involving this combination of entities. There are no significant validations for uploading a new deal pass through definition apart from validating that the department, supplier, costing location and location values supplied in the spreadsheet are valid and that the pass through % does not exceed 100%.

Update a Deal Pass Through Definition

If you would like to update any of the deal pass though related details, a similar process will be followed as that described above for creating new definitions. First,
download the Deal Pass Through spreadsheet, and then navigate to single tab in the spreadsheet where you would like to make your updates. Only the deal pass through % can be updated as part of the deal pass through definition. For the rows wherein the pass through % is intended to be updated, select the action type of Update, and then correct the value in the spreadsheet. Once your updates are complete, save and close the spreadsheet.

**Delete a Deal Pass Through definition**

If you wish to delete a deal pass through definition because it is not used by your business, update the action column to Delete against the rows in the Deal Pass Through tab that are to be deleted. Care should be taken before deleting a deal pass through definition as it can directly impact the pricing cost for a franchise customer.

**Upload Changes**

For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and select Foundation Data > Upload Foundation Data from the main task list. In this screen, you’ll again select the template type Franchise and the template Deal Pass Through. This will generate a process description automatically, but this can be updated if desired. Lastly, you’ll select the Browse button and navigate to the directory where you saved the updated spreadsheet.

To review the status of the upload and check whether any errors occurred, select the Foundation Data > Review Status task from the main task list.

For more information, see “Download Data,” “Data Upload,” and “View Data Loading Status” in the *Oracle Retail Merchandising Do the Basics User Guide*. 
Franchise orders, which are considered sales orders between the retailer and the franchise customer, need to be raised in order to fulfill demand from a franchise customer. A franchise order contains the item requisition to be sourced from a certain location (supplier, company warehouse or store) and fulfilled at one or more franchise stores by one or more required need dates. A franchise order also contains the price at which the items on the order will be sold to the franchise customer.

The Franchise Orders page allows you to take orders from franchise customers and fulfill those orders from store or warehouse inventory or by orders from suppliers.

The Franchise Order page contains the following sections.

- Franchise Order
- Items
- Bill to Address

**Figure 4–1 Franchise Order Page**
Franchise Order

The title of the Franchise Order section contains the franchise order ID by default. Additionally, the order type and order status are displayed in the right hand corner.

The section contains the following fields.

<table>
<thead>
<tr>
<th>Table 4–1 Franchise Order - Fields and Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fields</td>
</tr>
<tr>
<td>Customer</td>
</tr>
<tr>
<td>Currency</td>
</tr>
<tr>
<td>Customer Reference</td>
</tr>
<tr>
<td>Freight</td>
</tr>
<tr>
<td>Other Charges</td>
</tr>
<tr>
<td>Net Order Cost</td>
</tr>
<tr>
<td>Comments</td>
</tr>
<tr>
<td>Created Date</td>
</tr>
<tr>
<td>Cancel Reason</td>
</tr>
<tr>
<td>Bill to individual Shipment Location checkbox</td>
</tr>
<tr>
<td>Default:</td>
</tr>
<tr>
<td>Customer Location</td>
</tr>
<tr>
<td>Need Date</td>
</tr>
<tr>
<td>Not After Date</td>
</tr>
</tbody>
</table>

Items

The Items section contains information on the items on the order such as the item number, item description, customer location, and linked transactions like transfers or orders. The table also contains quantity and cost information.

Additionally, you can add, edit and delete items from the franchise order in this section. You can also view cost details and the stock on hand of the selected item.

Items - Actions Menu and Icons

Use the Actions Menu and icons to apply actions to the table. You can perform the actions listed below, as well as actions described in “Action Menu and Icons” in the Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide.
Franchise Order Transfers

The Linked Transaction column displays the order, transfer or allocation associated to the Franchise Order. For associated transfers and orders this column contains an order number or transfer number link. This link takes you to the Order or Transfer page.

For line items with multiple associated transfers, this field displays 'Multiple', instead of showing the transfer number link.

Click 'Multiple', and the Franchise Order Transfers page opens. The page displays all the transfers associated to the line item. The table shows the following columns:

- Transfer
- Created Date
- Delivery Date
- Status

Click Done to close the page.

Bill to Address

The Bill to Address section is only available if the Bill to individual Shipment Location checkbox is not selected in the Franchise Order section. In this section you can specify a bill to address for the franchise order.

- In the Default Bill Location field, enter, select or search for the location.
- In the Bill to Address field, enter, select or search for an address.

Table 4–2  Items - Actions Menu/Icos and Description

<table>
<thead>
<tr>
<th>Actions Menu/Icos</th>
<th>Description</th>
</tr>
</thead>
</table>
| Cost Details        | Opens the Cost Details pop-up. To view the cost details of an item on the franchise order:  
  - Select a record in the Items section.
  - Select Actions > Cost Details. The Cost Details pop-up appears.
  - View the cost buildup information for the selected item on the franchise order.
  - Click OK to close the pop-up. |
| Stock on Hand       | Opens the Inventory by Location pop-up.  
  For more information about this pop-up, see View Inventory by Location in the Oracle® Retail Merchandising Foundation Cloud Service Inventory User Guide.

Figure 4–2  Bill to Address Section
Franchise Order Toolbar

The toolbar contains the following icons and buttons, as well as icons and buttons described in “Screen Level Action - Icons and Buttons” in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

### Table 4–3 Franchise Order Toolbar - Icons/Buttons and Description

<table>
<thead>
<tr>
<th>Icons/Buttons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td>If you click the <strong>Status</strong> button, the status of the franchise order changes to the status specified on the button. Possible franchise order statuses are:</td>
</tr>
<tr>
<td></td>
<td>■ Input</td>
</tr>
<tr>
<td></td>
<td>■ Approved</td>
</tr>
<tr>
<td></td>
<td>■ In Progress</td>
</tr>
<tr>
<td></td>
<td>■ Cancelled</td>
</tr>
<tr>
<td></td>
<td>■ Closed</td>
</tr>
<tr>
<td></td>
<td>■ Pending Credit Approval</td>
</tr>
<tr>
<td><strong>Recalculation</strong></td>
<td>Opens the Order Recalculation pop-up. This pop-up allows you to scale, or undo scaling of the supplier sourced franchise orders. For more information about how to recalculate franchise orders, see the Recalculate Franchise Orders section.</td>
</tr>
<tr>
<td><strong>More Actions</strong></td>
<td>Click <strong>More Actions</strong> to see a list of additional actions that can be performed in the Franchise Order page.</td>
</tr>
<tr>
<td></td>
<td>■ <strong>Shipments</strong></td>
</tr>
<tr>
<td></td>
<td>■ <strong>Returns</strong></td>
</tr>
<tr>
<td></td>
<td>■ <strong>Currency</strong></td>
</tr>
<tr>
<td><strong>Save and Create Another</strong></td>
<td>Click <strong>Save and Create Another</strong> to save the entered records and add additional entries. This option is only available, if you create a new expense profile.</td>
</tr>
<tr>
<td><strong>Save and Edit Another</strong></td>
<td>Click <strong>Save and Edit Another</strong> to save the entered records and edit additional entries. This option is only available in Edit mode.</td>
</tr>
<tr>
<td><strong>Done</strong></td>
<td>If you open the page in view mode, the <strong>Done</strong> button is displayed. Click <strong>Done</strong> to close the page.</td>
</tr>
</tbody>
</table>

Create a Franchise Order

To create a franchise order, follow the steps below.
1. From the Tasks menu select, **Inventory > Franchise Orders > Create Order.** The Franchise Order page appears.

2. Enter the franchise order information, as required.

   For more details about the available fields in this section, see the **Franchise Order** section.

   For more information about how to add items to a franchise order, see the **Add Items to a Franchise Order** section.

3. Then choose one of the following options.

   - Click **Save** to save the current franchise order.
   - Click **Save and Close** to save the current franchise order and close the page.
   - Click **Save and Create Another** to create additional franchise orders.
   - Click **Cancel** to reject all entries and close the page.

---

**Add Items to a Franchise Order**

You can add the following item types to a franchise order:

- **Item or Reference Item**
  
  To add an item or a reference item, see the **Add an Item or Reference Item** section.

- **Item as a Complex Buyer Pack Item with the Order Type of Eaches**
  
  To add a complex buyer pack item, see the **Add a Complex Buyer Pack Item** section.

- **Item Parent or Item List**
  
  To add a parent item, see the **Add a Parent Item** section.
  
  To add an item list, see the **Add an Item List** section.

---

**Add an Item or Reference Item**

To add an item or a reference item, follow the steps below.

1. In the Items section, select **Action > Add**, or use the Add icon ⚪. The Add Item pop-up appears.

   ![Add Item Pop-Up](image)

   **Figure 4–3  Add Item Pop-Up**

a. In the **Item** field, select the item type from the list. Then enter or search for the item or reference item.
Add Items to a Franchise Order

b. In the **Source** field, select the source from the list. Then enter, select or search for the source.

c. In the **Customer Location** field, enter, select or search for the customer location.

d. In the **Requested Quantity** field, enter the quantity. Select the unit of measure.

e. In the **Fixed Cost** field, enter the fixed cost for the item.

**Note:** A fixed cost value overrides the customer cost computed through templates. This field is an optional field.

f. In the **Need Date**, enter the need date or use the Calendar icon to select a date.

g. In the **Not After Date**, enter the date or use the Calendar icon to select a date.

h. The **Supplier Pack Size** field, displays the pack size of the selected supplier. This field is only displayed, if you select supplier as a source type.

i. Then choose one of the following options.

- Click **OK** to add the current item to the table.
- Click **OK and Add Another** to add additional items.
- Click **Cancel** to reject all entries and close the pop-up.

**Add a Complex Buyer Pack Item**

To add a complex buyer back item to a franchise order, follow the steps below.

1. In the Items section, select **Action > Add**, or use the Add icon +. The Add Item pop-up appears.

a. In the **Item** field, select Item as the item type from the list. Then enter or search for a complex buyer pack item.

b. In the **Source** field, select the source from the list. Then enter, select or search for the source.

c. In the **Customer Location** field, enter, select or search for the customer location.

d. In the **Requested Quantity** field, enter the quantity. Select Eaches as unit of measure.

e. In the **Fixed Cost** field, enter the fixed cost for the item.

f. In the **Need Date** field, enter the need date or use the Calendar icon to select a date.

- In the **Not After Date** field, enter the date or use the Calendar icon to select a date.

h. The **Supplier Pack Size** field, displays the pack size of the selected supplier. This field is only displayed, if you select supplier as a source type.

i. Click **Display Items**. In the Distribute Complex Buyer Pack section all the components of the complex buyer pack item are displayed.
Add Items to a Franchise Order

**Note:** The table will only be populated when you have entered a requested quantity.

j. In the **Quantity** column enter the distribution quantity as required for the component items.

k. Then choose one of the following options.
   - Click **OK** to add the current item to the table.
   - Click **OK and Add Another** to add additional items.
   - Click **Cancel** to reject all entries and close the pop-up.

**Add a Parent Item**

To add a parent item to a franchise order, follow the steps below.

1. In the Items section, select **Action > Add**, or use the Add icon +. The Add Item pop-up appears.

![Add Item Pop-Up - Item Parent](image)

a. In the **Item** field, select the Item Parent as the item type from the list. Then enter or search for the item.

b. In the **Source** field, select the source from the list. Then enter, select or search for the source.

c. In the **Customer Location** field, enter, select or search for the customer location.

d. In the **Requested Quantity** field, enter the quantity. Select Eaches as the unit of measure.

e. In the **Need Date** field, enter the need date or use the Calendar icon to select a date.

f. In the **Not After Date** field, enter the date or use the Calendar icon to select a date.
g. The Supplier Pack Size field, displays the pack size of the selected supplier. This field is only displayed, if you select supplier as a source type.

h. Click Display Items. In the Distribute Item section all the children of the selected parent item are displayed.

i. In the Distribute Item section, choose one of the following distribution methods.
   - Choose Ratio. Then enter the ratio for the individual child items in the ratio column.
   - Choose Percentage. Then enter the percent for the individual child items in the percentage column.
   - Choose Quantity. Then enter the quantity for the individual child items in the quantity column.

j. Click Distribute to distribute the items according to the entered ratio or percentage.

k. Then choose one of the following options.
   - Click OK to add the current item to the table.
   - Click OK and Add Another to add additional items.
   - Click Cancel to reject all entries and close the pop-up.

---

**Add an Item List**

To add an item list to a franchise order, follow the steps below.

1. In the Items section, select Action > Add, or use the Add icon +. The Add Item pop-up appears.
   a. In the Item field, select Item List as the item type. Then enter or search for the item list.
   b. In the Source field, select the source from the list. Then enter, select or search for the source.
   c. In the Customer Location field, enter, select or search for the customer location.
   d. In the Requested Quantity field, enter the quantity. Then select the unit of measure.
   e. In the Need Date field, enter the need date or use the Calendar icon to select a date.
   f. In the Not After Date field, enter the date or use the Calendar icon to select a date.
   g. The Supplier Pack Size field, displays the pack size of the selected supplier. This field is only displayed, if you select supplier as a source type.
   h. Click Display Items. In the Distribute Item section all the items of the selected item list are displayed.
i. In the Distribute Item section, choose one of the following distribution methods.
   - Choose **Ratio**. Then enter the ratio for the individual child items in the ratio column.
   - Choose **Percentage**. Then enter the percent for the individual child items in the percentage column.
   - Choose **Quantity**. Then enter the quantity for the individual child items in the quantity column.

j. Click **Distribute** to distribute the items according to the entered ratio or percentage.

**Note:** The Distribute button is not available, if you have selected the distribution method **Quantity**.

k. If one of the items in the item list is a complex buyer pack item, the Distribute Complex Buyer Pack section is displayed. This section displays all the components of the complex buyer pack item.

**Note:** The table will only be populated when you have entered a requested quantity.

l. In the **Quantity** column enter the distribution quantity as required for the component items.

m. Then choose one of the following options.
   - Click **OK** to add the current item to the table.
   - Click **OK and Add Another** to add additional items.
   - Click **Cancel** to reject all entries and close the pop-up.

---

**Manage a Franchise Order**

The Manage Franchise Orders option opens the Franchise Order Search page. In this page you can perform the following actions.

- Search for franchise orders by using various search criteria
- View the search results
- View franchise order information
- Create a franchise order
- Edit franchise order information

You can access the Franchise Order Search page from the Task menu, by selecting **Inventory > Franchise Orders > Manage Franchise Orders**. The Franchise Order Search page appears.
Search for a Franchise Order

To search for a franchise order:

1. From the Task menu, select **Inventory > Franchise Orders > Manage Orders**. The Franchise Order Search page appears.

2. You can search for a franchise order using basic or advanced search criteria, depending on the requirement. The basic mode is the default search mode.
   - Click **Advanced** to access the search section in advanced mode.
   - Click **Basic** to return to basic mode.

Search for a Franchise Order Through the Basic Search Criteria

To search for a franchise order using basic search criteria:

1. Enter, select or search for one or all of the following basic search criteria.

<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Match</strong> option</td>
<td>Check radio button All or Any. All - only franchise orders matching all entered search criteria are shown. Any - franchise orders matching any of the entered search criteria are shown.</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Select the status of the franchise order from the list.</td>
</tr>
<tr>
<td><strong>Customer</strong></td>
<td>Enter, select or search for the customer.</td>
</tr>
<tr>
<td><strong>Supplier Site</strong></td>
<td>Enter, select or search for the supplier site.</td>
</tr>
</tbody>
</table>
2. Click **Search**. The franchise orders that match the search criteria are displayed in the Results section.

3. Click **Reset** to clear the search section and results.

4. Click **Done** to close the page.

### Search for a Franchise Order Through Advanced Search Criteria

To search for a franchise order using advanced search criteria:

1. To search using advanced search criteria, enter or select one or all of the advanced search criteria.

2. To narrow down the search, use the list next to the search fields. For example, determine if the entered value should equal or not equal the search result.

3. Click **Search**. The franchise orders that match the search criteria are displayed in the Results section.

4. Click **Reset** to clear the search section and results.

5. Click **Add Fields** to add more fields for the advanced search. To remove the field from the search, click the x right next to the field.

6. Click **Reorder** to change the order of the available search fields. The Reorder Search Fields pop-up appears.
   - Select the desired search field and use the up and down arrows to rearrange the order of the fields.
   - Click **OK** to confirm the new order of the fields and close the pop-up.
   - Click **Cancel** to reject any changes and close the pop-up.

7. Click **Done** to close the page.

### Results

The Results section lists the retrieved franchise orders. The following columns are displayed by default.

- Order Number
- Customer
- Customer Location
- Customer Location Name
- Source
Manage a Franchise Order

- Source Name
- Need Date
- Status
- Total Order Cost
- Currency

Franchise Order Search Toolbar

The toolbar contains the following button, as well as icons and buttons described in “Screen Level Action - Icons and Buttons” in the Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide.

<table>
<thead>
<tr>
<th>Icons/Buttons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Done</td>
<td>Click Done to close the page.</td>
</tr>
</tbody>
</table>

Edit a Franchise Order

To edit a franchise order, follow the steps below.

1. From the Tasks menu, select Inventory > Franchise Orders > Manage Orders. The Franchise Order Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click Search. The franchise orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link, or mark a record and select Actions > Edit, or use the Edit icon . The Franchise Order page appears.
5. Edit the fields as necessary.

For more details about the available fields in this section, see the Franchise Order section.

**Note:** You can add new items to a franchise order in Input status. For more information about adding items to a franchise order, see the Add Items to a Franchise Order section.

For existing items on an order, you can modify the Fixed Cost, Requested Quantity, Need Date, and Not After Date when the order is in Input status.

In Approved status, you can modify the Requested Quantity and Fixed Cost.

You can modify the Requested Quantity in the In Progress status.

For more information about how to edit items on a franchise order, see the Edit Items on a Franchise Order section.

6. Then choose one of the following options.
   - Click Save to save your changes to the franchise order.
Click **Save and Close** to save your changes to the franchise order and close the page.

Click **Save and Edit Another** to edit additional franchise orders.

Click **Cancel** to reject all entries and close the page.

---

**Edit Items on a Franchise Order**

To edit items on a franchise order, follow the steps listed below.

1. Select a record in the Items section.
2. Then select **Action > Edit**, or use the Edit icon. The Edit Item pop-up appears.

![Edit Item Pop-Up](image)

---

**a.** Edit the following fields, as necessary.

- **Requested Quantity**
- **Fixed Cost**
- **Need Date**
- **Not After Date**

**b.** In the **Cancel Reason** field, select reason for cancelling the item, if necessary.  

**Note:** This field is only available when the order status is Approved or In Progress, and the entered requested quantity is less than the original requested quantity, otherwise this field is not available.

**c.** Then choose one of the following options.

- Click **OK** to add your changes to the table.
- Click **Cancel** to reject all entries and close the pop-up.

---

**Recalculate Franchise Orders**

To change the scaling or to undo the scaling of the franchise order, follow the steps below.

1. In the Franchise Order page, select a record in the Items section.

**Note:** The Recalculation function is only available if the selected order line item is sourced from a supplier.
2. Then select the **Recalculation** button. The Order Recalculation pop-up appears.

   ![Figure 4–7 Order Recalculation Pop-Up](image)

   a. The **Supplier Pack Rounding** checkbox is selected by default.

   b. In the **Order Scaling** field, select one of the following options.
      - Select **Scale Order** to scale the order.
      - Select **Undo Order Scaling** to revert any scaling done for this order.

   c. Then choose one of the following options.
      - Click **OK** to save your changes.
      - Click **Cancel** to reject all entries and close the pop-up.

### Cancel a Franchise Order

To cancel a franchise order, follow the steps below.

1. From the Tasks menu, select **Inventory > Franchise Orders > Manage Orders**. The Franchise Order Search page appears.

2. Restrict your search to franchise orders with the status Approved, In-Progress, or Pending Credit.

3. Click **Search**. The franchise orders that match the search criteria are displayed in the Results section.

4. In the Order No. column, click the order number link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Franchise Order page appears.

5. Select **Cancel Order**. The Cancel Order pop-up appears.

   ![Figure 4–8 Cancel Order Pop-Up](image)

   a. In the **Cancel Reason** field, select a reason for cancelling the order from the list.

   b. Then choose one of the following options.
      - Click **OK** to cancel the franchise order and close the pop-up.

---

**Note:** For franchise orders in Approved status the entire ordered quantity is canceled. For orders in In Progress status only the outstanding quantity is cancelled.
- Click **Cancel** to reject your entries and close the pop-up.
Franchise Returns are defined as any return of stock from a franchise store to a company warehouse or store. The return can contain items from multiple orders, but must be from a single franchise store.

Two different types of returns can be created: either a return that brings inventory back to a company store or warehouse, or a return for which the returning store will destroy the goods on site. The latter may be used in the case where the goods are damaged beyond repair or perishable, such that the retailer does not want to take them back into inventory, but has agreed to refund the franchise customer.

**Figure 5–1 Franchise Return Page**

**Return Merchandise Authorization (RMA)**

The RMA (Return Merchandise Authorization) section includes the RMA number in the title. The return type and status is displayed in the right hand corner of the section.

The RMA section contains the following fields.
Table 5–1  RMA - Fields and Description

<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>Displays the customer.</td>
</tr>
<tr>
<td>Customer Location</td>
<td>Displays the customer location.</td>
</tr>
<tr>
<td>Return Location</td>
<td>Displays the return location.</td>
</tr>
<tr>
<td>Return Method</td>
<td>Displays the return method.</td>
</tr>
<tr>
<td>Currency</td>
<td>Displays the currency of the franchise return.</td>
</tr>
<tr>
<td>Customer Reference</td>
<td>Displays the customer reference, if available.</td>
</tr>
<tr>
<td></td>
<td>This field remains enabled until the franchise return is approved.</td>
</tr>
<tr>
<td>Create Date</td>
<td>Displays the date the franchise return has been created.</td>
</tr>
<tr>
<td>Cancel Reason</td>
<td>Displays the cancel reason.</td>
</tr>
<tr>
<td></td>
<td>This field is only displayed when the franchise return has been cancelled at</td>
</tr>
<tr>
<td></td>
<td>the header level.</td>
</tr>
<tr>
<td></td>
<td>Only 40 characters of the cancel reason are displayed.</td>
</tr>
<tr>
<td>Transfer</td>
<td>Displays the transfer number linked to the return. The transfer number link</td>
</tr>
<tr>
<td></td>
<td>takes you to the Transfer page in view mode.</td>
</tr>
<tr>
<td></td>
<td>This field is only available when the franchise return has been approved.</td>
</tr>
<tr>
<td>Comments</td>
<td>Displays comments for the franchise return.</td>
</tr>
</tbody>
</table>

Items

In the Items section you can add or maintain the items for the franchise return.

Items - Actions Menu and Icons

Use the Actions Menu and icons to apply actions to the table. You can perform the actions listed below, as well as actions described in “Action Menu and Icons” in the Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide.

Table 5–2  Items - Actions Menu/Icons and Description

<table>
<thead>
<tr>
<th>Actions Menu/Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mass Update and Mass</td>
<td>Opens the Mass Update pop-up. This option is only available for franchise returns in Input status.</td>
</tr>
<tr>
<td>Update button</td>
<td>For more information about the mass update option, see the Apply a Mass Update for Items on a Franchise Return section.</td>
</tr>
<tr>
<td>Stock on Hand</td>
<td>Opens the Inventory by Location page.</td>
</tr>
<tr>
<td></td>
<td>For more information about this page, see View Inventory by Location in the Oracle® Retail Merchandising Foundation Cloud Service Inventory User Guide.</td>
</tr>
</tbody>
</table>

Franchise Return Toolbar

The toolbar contains the following icons and buttons, as well as icons and buttons described in “Screen Level Action - Icons and Buttons” in the Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide.
Create a Franchise Return

To create a franchise return, follow the steps below.

1. From the Tasks menu, select **Inventory > Franchise Orders > Create Return**. The Create Return pop-up appears.

**Figure 5–2 Create Return Pop-Up**

![Create Return Pop-Up](image)

**Table 5–3 Franchise Return Toolbar - Icons/Buttons and Description**

<table>
<thead>
<tr>
<th>Icons/Buttons</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Status**    | If you click the **Status** button, the status of the franchise return changes to the status specified on the button. Possible franchise return statuses are:  
  - Input  
  - Approved  
  - In Progress  
  - Cancelled  
  - Closed |
| **More Actions** | Click **More Actions** to see a list of additional actions that can be performed in the Franchise Return page.  
  - **Currency**  
    Toggle between the system’s primary currency and the currency of the return. |
| **Done** | If you open the page in view mode, the **Done** button is displayed. Click **Done** to close the page. |

**Create a Franchise Return**

1. In the **Customer** field, enter, select or search for the customer. This field is a required field.
2. In the **Customer Location** field, enter select or search for the customer location. This field is a required field.
3. In the **Return Location** field, select a return location type from the list. Then enter, select or search for the return location. This field is a required field.
4. In the **Return Method** field, select if you want to return the item to the location or destroy the item on site. This field is a required field.
5. In the **Currency** field, enter, select or search for the currency of the franchise return. This field is a required field.
f. In the **Customer Reference** field, enter a customer reference, if available.

g. Then choose one of the following options.

- Select **OK** to create the franchise return and close the pop-up. The Franchise Return pop-up appears in a new tab. The RMA section of the pop-up contains the information you have entered.

  For more information about the Franchise Return pop-up, see the Franchise Return section.

- Then add items to the franchise return. For more information about how to add items to the franchise return, see the Add Items to a Franchise Return section.

---

**Note:** Select **Cancel** to reject all entries and close the pop-up.

---

### Add Items to a Franchise Return

To add an item to a franchise return, follow the steps below.

1. In the Items section, select **Actions > Add**, or use the Add icon. The Add Item pop-up appears.

**Figure 5–3  Add Item Pop-Up**

a. In the **Order No.** field, enter, select or search for the franchise order number. This field is a required field.

b. In the **Item** field, select if you want to return an item or reference item. Then enter, select or search for the item. This field is a required field.

c. The following fields are populated, depending on the selected item.

   - **Order Cost**

     If the selected item is a component of a pack item on the order, the cost is calculated based on its percentage of the pack item.

     If the selected item is both a component of a pack item on the order and a regular item on the order, the regular item’s cost is the cost displayed as the order cost.

   - **Ordered Quantity**

     If the selected item is a component of a pack item on the order, the ordered quantity is calculated based on the pack item.
If the selected item is both a component of a pack item on the order and a regular item on the order, the ordered quantity displays the sum of the component pack item and the regular item on the order.

d. In the Unit Return Cost field, enter the unit return cost. This field is a required field.

e. In the Return Reason field, select a return reason from the list.

f. In the Returned Quantity field, enter the return quantity.

g. In the Restocking Fee field, select either the restocking type percent or specific amount from the list. Then enter the desired value.

h. Then choose one of the following options.
   - Click OK to add the item and close the pop-up.
   - Click OK and Add Another to add additional items to the franchise return.
   - Click Cancel to reject all entries and close the pop-up.

2. In the Franchise Order Return pop-up, choose a saving option to save your franchise return.

Manage a Franchise Return

The Manage Franchise Returns option opens the Franchise Return Search page. In this page you can perform the following actions.

- Search for franchise returns by various search criteria
- View the search results
- View franchise return information
- Create a franchise return
- Edit franchise return information

You can access the Franchise Return Search page from the Task menu, select Inventory > Franchise Orders > Manage Franchise Returns. The Franchise Return Search page appears.
Search for a Franchise Return

To search for a franchise return:

1. From the Task menu, select **Inventory > Franchise Orders > Manage Returns**. The Franchise Return Search page appears.

2. You can search for a franchise return using basic or advanced search criteria, depending on the requirement. The basic mode is the default search mode.
   - Click **Advanced** to access the search section in advanced mode.
   - Click **Basic** to return to basic mode.

Search for a Franchise Return Through the Basic Search Criteria

To search for a franchise return using basic search criteria:

1. Enter, select or search for one or all of the following basic search criteria.

| Table 5–4 Franchise Return Search - Basic Search Criteria and Description |
|:---:|:---:|
| **Fields** | **Description** |
| **Match option** | Check radio button All or Any.  
All - only franchise returns matching all entered search criteria are shown.  
Any - franchise returns matching any of the entered search criteria are shown. |
| **RMA** | Enter the RMA. |
| **Return Location** | Enter, select or search for the return location. |
| **Customer** | Enter, select or search for the customer. |
2. Click **Search**. The franchise returns that match the search criteria are displayed in the Results section.

3. Click **Reset** to clear the search section and results.

4. Click **Done** to close the page.

**Search for a Franchise Return Through Advanced Search Criteria**

To search for a franchise return using advanced search criteria:

1. To search using advanced search criteria, enter or select one or all of the advanced search criteria.

2. To narrow down the search, use the list next to the search fields. For example, determine if the entered value should equal or not equal the search result.

3. Click **Search**. The franchise returns that match the search criteria are displayed in the Results section.

4. Click **Reset** to clear the search section and results.

5. Click **Add Fields** to add more fields for the advanced search. To remove the field from the search, click the x right next to the field.

6. Click **Done** to close the page.

**Edit a Franchise Return**

To edit a franchise return, follow the steps below.

1. From the Tasks menu, select **Inventory > Franchise Orders > Manage Returns**. The Franchise Return Search page appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The franchise returns that match the search criteria are displayed in the Results section.

4. In the RMA column, click the RMA link, or mark a record and select **Actions > Edit**, or use the Edit icon. The Franchise Return pop-up appears.

5. In the RMA section:

   Edit the **Customer Reference** field, or a comment to the franchise return.

---

**Note:** You can only edit these fields when the franchise return is still in Input status.

---
6. In the Items section:
   - Add an Item
     For more information about how to add an item to a franchise return, see the Add Items to a Franchise Return section
   - Edit an Item
     For more information about how to edit an item on a franchise return, see the Edit Items on a Franchise Return section.
   - Delete an Item
   - Apply a Mass Update for all items on the franchise return
     For more information about how to apply a mass update for items on a franchise order, see the Apply a Mass Update for Items on a Franchise Return section.

Note: You can only add, delete or apply mass updates for items on a franchise return when the return is still in Input status.

7. Then choose one of the following options.
   - Click Save to save your changes.
   - Click Save and Close to save your changes and close the pop-up.
   - Click Cancel to reject all entries and close the pop-up.

Edit Items on a Franchise Return
To edit an item on a franchise return, follow the steps below.

1. In the Items section, select Actions > Edit, or use the Edit icon Edit. The Edit Item pop-up appears.

   Figure 5–5 Edit Item Pop-Up

   a. Edit the following fields, as necessary.
      - Unit Return Cost
      - Return Reason
      - Returned Quantity
      - Restocking Fee
      - Cancel Reason
This field is only available, if the franchise return is in Approved status and the returned quantity is less than the original quantity.

b. Then choose one of the following options.
   – Click **OK** to add your changes to the table.
   – Click **Cancel** to reject all entries and close the pop-up.

**Apply a Mass Update for Items on a Franchise Return**

To apply a mass update for all items on the franchise return, follow the steps below.

---

**Note:** This option is only available for franchise returns in Input status.

---

1. In the Items section, select **Actions > Mass Update**, or use the **Mass Update** button. The Mass Update pop-up appears.

**Figure 5–6  Mass Update Pop-Up**

![Mass Update Pop-Up](image)

a. In the **Restocking Type** field, select either the restocking type percent or specific amount from the list. This field is a required field.

b. In the **Restocking Fee** field, enter the desired value.

c. Then choose one of the following options.
   – Click **OK** to update the restocking type and fee for all items on the franchise return.
   – Click **Cancel** to reject all entries and close the pop-up.

**Cancel a Franchise Return**

To cancel a franchise order, follow the steps below.

1. From the Tasks menu, select **Inventory > Franchise Orders > Manage Returns**. The Franchise Return Search pop-up appears.

2. Restrict your search to franchise returns with the status Approved and In Progress.

3. Click **Search**. The franchise returns that match the search criteria are displayed in the Results section.

4. In the RMA column, click the RMA number link, or mark a record and select **Actions > Edit**, or use the Edit icon ![Edit](image). The Franchise Return pop-up appears.

5. Select **Cancel Return**. The Cancel Return pop-up appears.
a. In the **Cancel Reason** field, select the reason for cancelling the franchise return.

b. Then choose one of the following options.
   - Click **OK** to cancel the franchise return.
   - Click **Cancel** to reject your entry and close the pop-up.