Oracle® Retail Pricing Cloud Service

Implementation Guide

Release 19.3.000

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Value-Added Reseller (VAR) Language

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Preface

This Implementation Guide describes the requirements and procedures to configure and integrate with Oracle Retail Pricing.

Audience

This Implementation Guide is for the following audiences:

- System administrators and operations personnel
- Database administrators
- System analysts and programmers
- Integrators and implementation staff personnel

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- Exact error message received
- Screen shots of each step you take

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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.

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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 these documents through My Oracle Support.)

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Overview

Oracle Retail Pricing is a configurable and flexible pricing solution designed to meet the varied needs of the retail industry. Pricing empowers retailers to streamline pricing strategies across the organization, yielding a more predictable and profitable outcome. It provides decision support through pricing-focused business information to validate and approve new retails and markdowns.

Pricing supports the creation and management of price changes, clearances and promotions, integrating with the pricing execution systems, such as the POS in the store and e-commerce systems, to provide details on these events when approved. Its functionality includes the definition, maintenance, and review of price changes, clearances, and promotions, with capabilities that range from simple item price changes at a single location to complex promotional offers across zones. Pricing events are defined against the zone structure, which represents a group of locations organized to support a retailer's pricing strategy. It also allows the user to break out of the zone structure and create location-level events as needed.

Pricing has three primary functions to create and maintain regular price changes, clearances, and promotions. Although each of the three pricing activities is unique, the system displays these using a common look and feel to the user creating events. The solution also supports dashboards to support management by exception, and leverages the notification framework to alert users to conflicting pricing events.

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Getting Started

System Options

System options are used to control behavior in Pricing, configure the duration that historical price events will be retained, and provide some defaulting for new events. The first time that pricing is opened after provisioning, these options should be configured in order to ensure that all pricing foundation and events created follow the desired behavior.

Price Events

System Option	Optional?	Re-configuration Restricted?	Default Value	Description
Price Event Processing Days	No	No	1	Represents the minimum number of days required between the create date and the effective date for all price events. This system option also defines when promotions are communicated to external systems. Unlike price changes and clearances that are communicated on approval, promotions wait until closer to the effective date since there tend to be more last-minute changes to promotions than other types of events. Price events that are created with an effective date closer than this number of days from the current date are considered "emergency" changes. Valid values are 1-999.
Single UOM Used for All Items	Yes	Conditional		Indicates that all prices in your business will be in terms of the same selling unit of measure (UOM). It is recommended that a value always be set for this system option unless you do have varying selling units of measure for your business, as this will save users a step of having to enter a unit of measure and prevent potential errors. Valid values for this system option are pulled from the Merchandising units of measure. **Note:** once a value is initialized, the system option will be disabled and cannot be updated.
Offer End Date Required	No	No	Unchecked	Indicates whether an end date on a promotional offer is required. Valid values are checked (1) or unchecked (0). If checked, then all promotional offers will require an end date before they can be approved.
Allow Reward List Exclusions on Transaction Offers	No	No	Checked	Determines whether or not exclusions can be defined for transaction level offers. The reward list exclusion allows you to indicate whether or not there are certain items that should not have the discount applied, if on the customer's transaction. If this is checked (1), then users will be allowed to add exclusions to the rewarded items on a transaction offer. If unchecked (0), then the option to add exclusions will be hidden.[1]

System Option	Optional?	Re-configuration Restricted?	Default Value	Description
Allow Clearance and Promotion Overlap	No	Conditional	Unchecked	Indicates whether or not promotional offers will be allowed to apply to items on clearance. If this is set to checked (1), then promotions can be applied to clearance items. If this is set to unchecked (0), then the "Apply To" option when creating promotional offers will default to "Regular" and be hidden. **Note:** if this value is changed from unchecked to checked, then after saving the update the option will be disabled and cannot be updated.
Reset Clearance with Price Change	No	Conditional	Unchecked	Indicates whether or not a price change will be able to be created for an item/location currently on clearance or that will be on clearance on the price change effective date. If this option is not checked (0), then a reset will need to be created and approved first before any new price changes can be created. If it is checked (1), then you will be able to create a price change for an item/location that is currently or will be on clearance, resetting it to regular price and changing the regular selling price in one update. This option has a dependency on the Zone/Parent Ranging system option. If that option is set to unchecked (0), then this parameter must have a value of checked. Similarly, if this option is set to unchecked, the Zone/Parent Ranging parameter must be checked (1). **Note:** after this value is initialized, the option will be disabled and cannot be updated.
Markdown Value Required on Clearances	No	No	Unchecked	Determines whether or not it is required that a markdown value (e.g. First, Second, etc.) is defined for clearance markdowns and resets. If this option is set to checked (1), then the markdown value must be defined when creating a new markdown. If this is set to unchecked (0), then it is not required.
Allow Multi Unit Pricing	No	No	Unchecked	Determines whether multi-unit pricing functionality will be used in both Merchandising and Pricing. Valid values are unchecked (0) or checked (1).

System Option	Optional?	Re-configuration Restricted?	Default Value	Description
Allow Supplier Site and Brand for Offer Item Selection	No	No	Unchecked	Defines whether the supplier/brand merchandise level are enabled when creating offers. Valid values are: unchecked (0) or checked (1). This value should be set based on what your selling solutions can support. If integrating with Xstore POS, this should be set to unchecked.

[1] If implementing with Xstore POS, this should be set to unchecked, as Xstore does not support exclusions to transaction level offer reward lists.

Conflict Checking

System Option	Optional?	Re-configuration Restricted?	Default Value	Description
Clearance Retail must be less than or equal to Regular Retail	No	No	Checked	Determines whether or not the initial clearance markdown can increase the price of an item/location from its current regular price. This is typically only required for cases where there is concern over user error resulting in a price change being created rather than a clearance for the first markdown. Valid values are checked (1) and unchecked (0).
Clearance Retail must be less than Previous Markdown	No	No	Checked	Determines whether or not subsequent markdowns for item/locations can increase the price from its current clearance price. This is typically only required for cases where there is concern over user errors. Valid values are checked (1) and unchecked (0).
Run for Submit	No	No	Checked	Determines whether or not conflict checking will be run for price changes and clearances when an event is submitted. If unchecked (0), then conflict checking will only apply when attempting to approve a price event or updating an approved event. When checked (1), it will apply both when submitting and approving.

Zones

System Option	Optional?	Re-configuration Restricted?	Default Value	Description
Zone/Parent Ranging	No	Conditional	Checked	Defines whether or not transaction level item/location ranging is required when creating price events, including regular price changes or clearance, at higher levels. For example, when setting up price changes at zone and parent level, it checks that at least one store or warehouse in the zone has an item/location relationship defined for at least one transaction item in the parent to ensure that price changes are not set up on items where nothing is sold.
				If this system option is checked (1), when a user creates a price change or clearance at a level higher than transaction item/location level, there must be at least one item/location ranged on the event. If not, then there will be an error raised when the event is created. If this system option is not checked (0), then ranging validation will only be performed on price events created at the transaction/location level and ranging checks will not be performed on events created at any other higher level.
				This system option has a dependency on the Reset Clearance with Price Change option. If the Zone/Parent Ranging option is unchecked, then the Reset Clearance with Price Change option must be checked. Similarly, if the Reset Clearance with Price Change option is unchecked, then the Zone/Parent Ranging option must be checked.
				Note: after this value is initialized, the option will be disabled and cannot be updated.
Recognize Warehouses as Locations	No	Conditional	Unchecked	Controls whether or not warehouses can be added to zones, or be added to price changes and clearances. If unchecked (0), then price for your warehouses will not be impacted by price changes and clearances. If checked (1), then price will be managed at warehouses and warehouses can also be individually added to events.
				Note: if this value is changed from unchecked to checked, then after saving the update the option will be disabled and cannot be updated.

Data Retention

System Option	Optional?	Re-configuration Restricted?	Default Value	Description
Executed Price Changes Months	No	No	2	Defines how many months executed price changes will be retained. Valid values are 1-24 months. Note: when the process runs to remove executed price changes, it will remove a whole month at a time. So, some events may be retained slightly longer than the number of months defined here.
Executed Clearances Months	No	No	2	Defines how many months executed clearances will be retained. Valid values are 1-24 months. Note: when the process runs to remove executed markdowns and resets, it will remove a whole month at a time. So, some events may be retained slightly longer than the number of months defined here.
Expired Price Change and Clearance Days	No	No	3	Defines how many days that expired price changes, markdown, and resets will be retained. An expired event is defined as an event that has passed its effective date and is still in Worksheet, Submitted, or Rejected status. Valid values are 1-999 days.

Data Filtering

This section of system options is only displayed if the Merchandising system option Data Level Filtering Enabled is checked (Y).

System Option	Optional?	Re-configuration Restricted?	Default Value	Description
Clearance Cadence Templates - Merchandise Hierarchy Level	Yes	Yes	NULL	Holds the merchandise hierarchy level used for filtering of cadence templates. Valid values are division (D), group (G), department (P), class (C) or subclass (S). If null, then data filtering by merchandise hierarchy is not applied for this entity.

System Option	Optional?	Re-configuration Restricted?	Default Value	Description
Clearance Cadence Templates - Organizational Hierarchy Level	Yes	Yes	NULL	Holds the organizational hierarchy level used for filtering of cadence templates. Valid values are chain (C), area (A), region (R), or district (D). If null, then data filtering by organizational hierarchy is not applied for this entity.

System Defaults

System defaults allow you to set up certain defaults for each price event type that will be used by default when new events are created. Users will be able to override them on a particular event, but adding defaults can help cut down on errors if you want your users to always enter price events in a particular way.

Price Change

System Option	Optional?	Re-configuration Restricted?	Default Value	Description
Item Level	Yes	No	Item	Indicates the default level that items will be added to price changes. If a value exists for this system option, then when an event is created, the item level will default to this value, but can be changed. Valid values are Item, Parent/Diff, Upload List, and Item List.
Diff Type	Yes	No		Indicates the default diff type that will be used if the item level on a price change is Parent/Diff. If a value exists for this system option, then when an item is added, the diff type will default to this value, but can be changed. Valid values are based on the diff types defined in Merchandising.
Change Type	Yes	No		Indicates the change type that will be used by default when creating a price change. If a value exists in this system option, then when an event is created, the change type will default to this value, but can be changed. Valid values are: Change by Percent, Change by Amount, Fixed Price, or Reset POS.

System Option	Optional?	Re-configuration Restricted?	Default Value	Description
Reason	Yes	No		Provides a default for the reason code on a price change, but can be changed by event, if needed. Valid reasons are managed using code type PCRC. For more information, see "Pricing Codes and Descriptions".

Clearance

System Option	Optional?	Re-configuration Restricted?	Default Value	Description
Item Level	Yes	No	Item	Indicates the default level that items will be added to markdowns and resets. If a value exists for this system option, then when an event is created, the item level will default to this value, but can be changed. Valid values are Item, Parent/Diff, Upload List, and Item List.
Diff Type	Yes	No		Indicates the default diff type that will be used if the item level on a markdown or reset is Parent/Diff. If a value exists for this system option, then when an item is added, the diff type will default to this value, but can be changed. Valid values are based on the diff types defined in Merchandising.
Change Type	Yes	No		Indicates the change type that will be used by default when creating markdowns and resets. If a value exists in this system option, then when an event is created, the change type will default to this value, but can be changed. Valid values are: Percent Off, Amount Off, and Fixed Price.
Reason	Yes	No		Provides a default for the reason code on a price change, but can be changed by event, if needed. Valid reasons are managed using code type PCRC. For more information, see "Pricing Codes and Descriptions".

System Option	Optional?	Re-configuration Restricted?	Default Value	Description
Markdown Value for Resets	Yes	No	Reset	Defines which of the clearance markdown values is used to represent a clearance reset. It will also be used to determine which options to hide from the Markdown list when creating or editing a clearance markdown. This value will also be used to default the Markdown value when adding a clearance reset. Valid values for this option are managed using code type MKDN. For more information, see "Pricing Codes and Descriptions".

Promotion

System Option	Optional?	Re-configuration Restricted?	Default Value	Description
Item Level	Yes	No		Indicates the default level that items will be added to promotional offers. If a value exists, then when an offer is created, the item level will default to this value, but can be changed. Valid values are All Departments, Department, Class, Subclass, Parent/Diff, Item, Item List, and Upload List.
Diff Type	Yes	No		Indicates the default diff type that will be used if the item level on an offer is Parent/Diff. If a value exists, then when an offer is created, the diff type will default to this value, but can be changed. Valid values are based on the diff types defined in Merchandising.
Discount Type	Yes	No		Indicates the default discount type for promotional offers. If a value exists, then when an offer is created, the discount type will default to this value, but can be changed. Valid values are Percent Off, Amount Off, and Fixed Price.
Cancel Reason	Yes	No		Provides a default for when a promotional offer is cancelled by a user. Valid reasons are managed using code type ORFC. For more information, see "Pricing Codes and Descriptions".

Report Options

System Option	Optional?	Re-configuration Restricted?	Default Value	Description
Critical Count of Unapproved Price Changes	No	No	10	Indicates the number of unapproved price changes that will be considered critical in the Price Changes Pending Approval dashboard report. If the number is less than the values in this system option, the tile for the report on the dashboard will be green. If the number is greater than this value, the tile will be yellow. Valid values are 1-999.
Critical Count of Unapproved Clearances	No	No	10	Indicates the number of unapproved markdowns or resets that will be considered critical in the Clearance Pending Approval dashboard report. If the number is less than the values in this system option, the tile for the report on the dashboard will be green. If the number is greater than this value, the tile will be yellow. Valid values are 1-999.

System Administration

System Option	Optional?	Re-configuration Restricted?	Default Value	Description
Auto Purge of Conflict Check Working Tables	No	No	Checked	Determines if the conflict check engine will automatically purge working data from the processing tables at the end of processing. Valid values are checked (1) or unchecked (0).
Price Change Maximums - Groups for Download or Search Results	No	No	100	Specifies the maximum number of price change groups that are returned the search results of the Price Change Group Search screen. Valid values are 1-999.
Price Change Maximums - File Size for Upload	No	No	50,000	This parameter is not used by Pricing.
Price Change Maximums - Upload Chunk Size	No	No	500	Maximum number of uploaded price change events to be processed in a single thread for uploads from a spreadsheet, the web service, or via batched upload.

System Option	Optional?	Re-configuration Restricted?	Default Value	Description
Clearance Maximums - Groups for Download or Search Results	No	No	100	Specifies the maximum number of clearance groups that are returned the search results of the Clearance Group Search screen. Valid values are 1-999.
Clearance Maximums - File Size for Upload	No	No	50,000	This parameter is not used by Pricing.
Clearance Maximums - Upload Chunk Size	No	No	500	Maximum number of uploaded clearance events to be processed in a single thread for uploads from a spreadsheet, the web service, or via batched upload.
Promotion Maximums - Search Results	No	No	100	Specifies the maximum number of promotions that are returned the search results of the Promotion Search screen. Valid values are 1-999.
Promotion Maximums - Promo Upload Chunk Size	No	No	50	Indicates the number of rows that will be processed by any one thread when uploading promotional offers.
Event Maximums - Price Inquiry Search Results	No	No	1000	Indicates the maximum number of rows that the price inquiry search results table can display.

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Pricing Codes and Descriptions

The following Merchandising codes are used to manage some of the dropdowns and options in Pricing. The details on how each are used is described below. Some of these codes allow new values to be added, while others only allow you to configure certain options off or update descriptions and translations. To configure any of these options, you'll need to use the Merchandising Codes and Descriptions spreadsheet download and upload functionality. This includes updating the terminology used for these codes, marking those that you are not using, as well as updating or adding any translations. You can find details on how to access and use the spreadsheet upload for Codes and Descriptions in the Merchandising Implementation Guide.

Clearance Codes

Code Type	Code Type Description	Notes	Add New Allowed?
CLCT	Pricing Application - Clearance Change Types	Used to determine the valid discount types for clearance markdowns - Percent Off, Amount Off, Fixed Price or Reset. This code type provides the options available to a user in the dropdowns when creating markdowns in the Pricing UI or the spreadsheet upload. You could indicate one or more codes as not used to hide the values in your implementation. Note: one of the values for this code type is Exclude. That is used only systematically when an item/location needs to be excluded from a price event due to conflicts. This will not normally be visible as a change type to users, but it is visible when using the spreadsheet upload method. If a user chooses that value for upload, an error will be raised.	No
CLIV	Pricing Application - Clearance Item Levels	Used to determine the valid item levels for creating clearance markdowns - Item, Parent/Diff, Upload List, Item List, or Item Parent. This code provides the options available to a user in the dropdowns when creating markdowns in the Pricing UI. You could indicate one or more codes as not used to hide the values in your implementation. **Note:** code type 4 - Item Parent is used for backend processing only and is not displayed in the UI.	No
CLLI	Pricing Application - Clearance Location Levels - Induction	Used to provide a user-friendly description of the location type for users to select when downloading and uploading clearances using a spreadsheet, as well as through the web service or batched upload - Zone, Store, or Warehouse. You could indicate one or more codes as not used to hide a value in your implementation.	No
CLLL	Pricing Application - Clearance Location Levels	Used to provide options for location type when creating clearance events in the Pricing screens. Valid values are Zone, Store, Warehouse, or Location List. You could indicate one or more codes as not used to hide the values in your implementation.	No
CLSI	Pricing Application - Clearance Statuses - Induction	Used to provide a user-friendly description of the status for a clearance markdown for users to select when downloading and uploading clearances using a spreadsheet, as well as through the web service or batched upload. You could indicate one or more codes as not used to hide a value, but it is not recommended as it could result in errors when downloading existing clearance events.	No

Code Type	Code Type Description	Notes	Add New Allowed?
CLST	Pricing Application - Clearance Statuses	Indicates the valid values for status for clearance markdowns. Used for display in the clearance UIs. You could indicate one or more codes as not used to hide a value, but it is not recommended as it could lead to errors.	No
CMRC	Pricing Application - Clearance Reasons	Indicates the valid reason codes for a clearance markdown. This code is expected to be updated for your implementation to add new reason codes that are applicable for your business. The default codes provided as part of the initial installation can also be renamed to better suit your business. All new codes added must be numeric.	Yes
MKDN	Pricing Application - Clearance Markdowns	Indicates the valid markdown numbers for a clearance markdown (e.g. First, Second, Final, and so on). This code is expected to be updated for your implementation to add new codes that are applicable for your business. The default codes provided as part of the initial installation can also be renamed to better suit your business. All new codes added must be numeric.	Yes

Price Change Codes

Code Type	Code Type Description	Notes	Add New Allowed?
PCCT	Pricing Application - Price Change Change Types	Used to determine the valid change types for regular price changes - Change by Percent, Change by Amount, Fixed Price, Reset POS, or Multi-Unit Fixed Price. This code provides the options available to a user in the dropdowns when creating price changes in the Pricing UI or the spreadsheet upload. You could indicate one or more codes as not used to hide the values in your implementation. Note: one of the values for this code type is Exclude. That is used only systematically when an item/location needs to be excluded from a price event due to conflicts. This will not normally be visible as a change type to users, but it is visible when using the spreadsheet upload method. If a user chooses that value for upload, an error will be raised.	No

Code Type	Code Type Description	Notes	Add New Allowed?
PCIL	Pricing Application - Price Change Item Levels	Used to determine the valid item levels for creating regular price changes - Item, Parent/Diff, Upload List, Item List, and Item Parent. This code provides the options available to a user in the dropdowns when creating price changes in the Pricing UI. You could indicate one or more codes as not used to hide the values in your implementation. **Note:** code type 4 - Item Parent is used for backend processing only and is not displayed in the UI.	No
PCIM	Pricing Application - Price Change Impacts to Multi Unit Retail	Used to indicate the impact of a price change on the multi-unit retail of an item. The value selected on a price change help determine the workflow for the pricing analyst, as well as the intended behavior if no multi-unit pricing information is added for a price change. Valid values are Add or Update, Remove, or No Change.	No
PCLI	Pricing Application - Price Change Location Levels - Induction	Used to provide a user-friendly description of the location type for users to select when downloading and uploading price changes using a spreadsheet, as well as through the web service or batched upload - Zone, Store, or Warehouse. You could indicate one or more codes as not used to hide the values in your implementation.	No
PCLL	Pricing Application - Price Change Location Levels	Used to provide options for location type when creating price changes in the Pricing screens. Valid values are Zone, Store, or Warehouse. You could indicate one or more codes as not used to hide the values in your implementation.	No
PCRC	Pricing Application - Price Change Reasons	Indicates the valid reason codes for a regular price change. This code is expected to be updated for your implementation to add new reason codes that are applicable for your business. The default codes provided as part of the initial installation can also be renamed to better suit your business. All new codes added must be numeric.	Yes
PCSI	Pricing Application - Price Change Statuses - Induction	Used to provide a user-friendly description of the status for a regular price change for users to select when downloading and uploading price changes using a spreadsheet, as well as through the web service or batched upload. You could indicate one or more codes as not used to hide a value, but it is not recommended as it could result in errors when downloading existing price events.	No
PCSS	Pricing Application - Price Change Statuses	Indicates the valid values for status for price changes. Used for display in the price change UIs. You could indicate one or more codes as not used to hide a value, but it is not recommended as it could lead to errors.	No

Promotional Offer Codes

Code Type	Code Type Description	Notes	Add New Allowed?
IBOT	Pricing Application - Promotion Item Buy/Get Offer Templates	Used to determine the valid offer templates for promotional item-level offers of type Buy/Get: ■ Buy X, Get Discount ■ Buy X, Get Discount ■ Spend X, Get Discount ■ Buy X, Get Y for Discount ■ Spend X, Get Y for Discount ■ Buy X of Single Item for Discount ■ Buy X and Y, Get Discount ■ Buy X and Y, Get Z for Discount These codes provide the options available to a user in the dropdowns when creating promotional offers in the Pricing UI. You could indicate one or more codes as not used to hide the values in your implementation if not supported by your selling solutions or not a desirable offer type.	No
IGOT	Pricing Application - Promotion Item Gift with Purchase Offer Templates	Used to determine the valid offer templates for promotional item-level offers of type Gift with Purchase: ■ Buy X, Get Gift with Purchase ■ Spend X, Get Gift with Purchase These codes provide the available options to a user in the dropdowns when creating promotional offers in the Pricing UI. You could indicate one or more codes as not used to hide the values in your implementation if not supported by your selling solutions or not a desirable offer type.	No
IOTP	Pricing Application - Promotion Item Offer Types	Used to determine the valid offer types for promotional item-level offers when creating offers in the Pricing UI: ■ Simple Discount ■ Buy/Get ■ Gift with Purchase You could indicate one or more codes as not used to hide the values in your implementation if not supported by your selling solutions or not a desirable offer type.	No

Code Type	Code Type Description	Notes	Add New Allowed?
ISOT	Pricing Application - Promotion Item Simple Offer Templates	Used to determine the valid offer types of promotional item-level offers of type Simple Discount: ■ Get Y for Discount These codes provide the available options to a user in the dropdowns when creating promotional offers in the Pricing UI. There is one code for this type - Get Y for Discount. You could indicate this code as not used to hide the values in your implementation if not supported by your selling solutions or not a desirable offer type.	No
OFCT	Pricing Application - Promotion Offer Change Types	Indicates the valid discount types for promotional offers - Percent Off, Amount Off, or Fixed Price. You could indicate one or more codes as not used to hide the values in your implementation if not supported by your selling solutions. This code is only used in the system options screen to determine the default values.	No
OFDR	Pricing Application - Promotion Offer Distribution Rules	Indicates how the selling solution should apply the discount on a customer's purchase for certain item-level offer types - Buy Items, Get Items, or Both Buy and Get Items. You could indicate one or more codes as not used to hide the values in your implementation if not supported by your selling solutions. Note: Xstore does not support using this indicator from Pricing. Therefore, when implementing with Xstore all but the "Get Items" option should be turned off.	nO
OFII	Pricing Application - Promotion Offer Item Levels - Induction	Indicates the valid item levels for inclusion or exclusion that can be used when uploading promotional offers from an external source or from a spreadsheet. These item levels are used for both the conditions and rewards part of the offer, where applicable. If any of these levels cannot be used for your implementation because your POS or OMS cannot interpret the data, then you can choose to mark those levels as not used. For example, if your POS doesn't have information on the valid suppliers for an item, you may need to hide the Supplier Site/Brand option. Valid values are Department (1), Class (2), Subclass (3), Parent/Diff (5), Item (6), All Departments (8), and Supplier Site/Brand (11).	No

Code Type	Code Type Description	Notes	Add New Allowed?
OFIL	Pricing Application - Promotion Offer Item Levels	Indicates the valid item levels for inclusion and exclusion on promotional offers. This list is used for both the buy conditions and the get conditions as part of the offer creation. If any of these levels cannot be used for your implementation because your POS or OMS cannot interpret the data, then you can choose to mark those levels as not used. For example, if your POS doesn't have information on the valid suppliers for an item, you may need to hide the Supplier Site/Brand option. Valid values are Department (1), Class (2), Subclass (3), Item Parent (4), Parent/Diff (5), Item (6), Item List (7), All Departments (8), Upload List (10), and Supplier Site/Brand (11). Note that Item Parent is used only in backend processing.	No
OFLI	Pricing Application - Promotion Offer Location Levels - Induction	Indicates the valid location types that can be used when uploading promotions from an external source or from a spreadsheet. Valid values are Store (0) or Zone (1).	No
OFLV	Pricing Application - Promotion Offer Levels	Indicates the valid levels that offers can be created - Item or Transaction. Note: this code is used primarily for the labels on the screen, so setting the used flag to No doesn't impact how it is displayed.	No
OFRC	Pricing Application - Promotion Offer Cancel Reasons	Indicates the valid reason codes for an offer cancellation. This code is expected to be updated for your implementation to add new reason codes that are applicable for your business. The default codes provided as part of the initial installation can also be renamed to better suit your business. All new codes added must be numeric.	Yes
OFTI	Pricing Application - All Promotion Offer Templates - Induction	Lists all the valid offer templates supported by pricing for display in the spreadsheet download/upload function.	No
OPRO	Pricing Application - Promotion Offer Price Restriction Operators	Indicates the valid operators that can be used when defining a price restriction as part of the item qualifier criteria on an offer. Valid values are Less than, Greater than, or Between. You could indicate one or more codes as not used to hide the values in your implementation if price restrictions are not fully supported by your selling solutions.	No
PRAT	Pricing Application - Promotion Offer Applies To Values	Contains the options for which types of items an offer applies to: Regular, Clearance, or Regular and Clearance.	No

Code Type	Code Type Description	Notes	Add New Allowed?
PRST	Pricing Application - Promotion Offer Statuses	Indicates the valid values for status used for promotional offers. Used for display in the promotion UIs. You could indicate one or more codes as not used to hide a value, but it is not recommended as it could lead to errors.	No
TBOT	Pricing Application - Promotion Transaction Buy/Get Offer Templates	Used to determine the valid offer templates for promotional transaction-level offers of type Buy/Get: ■ Buy X, Get Discount ■ Spend X, Get Discount These codes provide the available options to a user in the dropdowns when creating promotional offers in the Pricing UI. You could indicate one or more codes as not used to hide the values in your implementation if not supported by your selling solutions or not a desirable offer type.	No
TOTP	Pricing Application - Promotion Transaction Offer Types	Used to determine the valid offer types for promotional transaction-level offers - Simple Discount or Buy/Get. These codes provide the available options to a user in the dropdowns when creating promotional offers in the Pricing UI. You could indicate one or more codes as not used to hide the values in your implementation if not supported by your selling solutions or not a desirable offer type.	No
TSOT	Pricing Application - Promotion Transaction Simple Offer Templates	Used to determine the valid offer templates for promotional transaction-level offers of type Simple Discount ■ Get Discount These codes provide the available options to a user in the dropdowns when creating promotional offers in the Pricing UI. You could indicate one or more codes as not used to hide the values in your implementation if not supported by your selling solutions or not a desirable offer type.	No

Other Pricing Codes

Code Type	Code Type Description	Notes	Add New Allowed?
CLCA	Pricing Application - Clearance Cadence	Indicates the options for adding markdowns to a clearance group - either as a single markdown (S) or using a template (T).	No

Code Type	Code Type Description	Notes	Add New Allowed?
MKUT	Pricing Application - Markup Types	Indicates the options for markup type used by Pricing. Valid values are Cost (0) and Retail (1).	No
RPMT	Pricing Application - Template Types	Indicates the valid template types for configuring spreadsheets to use for download and upload of Price Changes and Clearances. It is not recommended that these be updated.	No
RTCA	Pricing Application - Template Categories	Indicates the valid template categories for configuring spreadsheets to use for download and upload of Price Changes and Clearances. It is not recommended that these be updated.	No
YIND	Pricing Application - Yes or No Indicator	Used to decode values of Yes or No for more user-friendly display in spreadsheets or UIs, as these are held as numeric values in the database.	No

4

Configure Foundation Data

Merchandising Dependencies

The majority of the foundational data that is used by Pricing is supplied by direct integration with Merchandising. In addition to the items and locations used by Pricing, the following information is also used:

- Languages and data translations

- Currencies and exchange rates

- Currency and quantity precisions

- Units of measure (UOMs)

- Item and location lists

- Diff Groups and Diffs

For details on configuring currencies, languages and translations, currency and quantity precisions, UOMs, and VAT information, see the *Oracle Retail Merchandising Implementation Guide*. For details on how to create and manage item lists, diff groups, and diffs, see the *Oracle Retail Merchandising Items User Guide*.

Template Configuration

Regular price changes, clearance, and promotions support the ability to download and upload events using spreadsheets. These spreadsheets are all managed using a template that allows you to configure different versions of the template based on how you want to create events. Configurations include displaying or hiding certain columns, defining default values, and changing the worksheet and column labels.

For example, you could have one template that is used for a portion of your business responsible for pricing your soft lines that may price by parent item/diff (for example, style/color) and another area that is responsible for pricing hardline items that don't use diffs. For the soft line area of the business, they could use a template configured to display the diff field in the template, whereas a second template could be used by the other area that hides that field.

As a starting point for all template configuration, it is recommended that you take the base template for each price entity and create one or more copies to apply your configuration, instead of using the base template. This will help to insulate your configurations from any future changes to the base template when Pricing is patched, such as if new columns are added as part of a product enhancement.

All template configuration for Pricing is done in the Merchandising screens. For more details on this configuration, see the *Oracle Retail Merchandising Implementation Guide*.

Translation

Pricing supports operating the user interface in 19 languages, including English. As part of the install options for Merchandising, you'll designate one language as "primary", which also applies for Pricing. This primary language is what is loaded as a default for all screen labels and error messages in Pricing at the time of installation. By default, only the primary language you indicated at installation is loaded in Pricing, but if you wish to have more languages loaded, then you can request to have the language strings loaded for these languages as well.

- Arabic
- Chinese (simplified)
- Chinese (traditional)
- Croatian
- Dutch
- French
- German
- Greek
- Hungarian
- Italian
- Japanese
- Korean
- Polish
- Portuguese
- Russian
- Spanish
- Swedish
- Turkish

This means that all screen labels, error messages, and menu options are supported out of the box in these languages and users are able to select from these languages as their preferred language.

> **Note:** Data translation is not supported for any Pricing owned entities.

Translate Labels and Seeded Data

If you would like to modify the translations for labels and error messages, or add translations for other languages[1] that are not included in the list above, there are several methods provided. The method used will depend on the data that needs to be updated/added. Translatable text is held in two different ways:

- Resource bundles, which contain most of the screen labels, menus, and messages

> - Database tables, which contain strings used in drop-downs, and some labels

Resource Bundles

Screen labels and other UI related data that may require updates/additions for Pricing are managed in resource bundles. For details on how to make updates to resource bundles see the Resource Bundles section in the *Oracle Retail Merchandising Customization and Extension Guide*.

Database Tables

Most other labels and drop-downs that are not managed in resource bundles are managed in the"Pricing Codes and Descriptions" spreadsheet download/upload process. You can use the method described for managing that data to update or add your translations in the designated tab in the spreadsheet.

For details on how to configure translations of Merchandising owned data that is used by Pricing, see the *Oracle Retail Merchandising Implementation Guide*.

Configure User Language

Users can choose their preferred language to have the user interface displayed as part of setting up their user preferences. As noted above, the values loaded in the base table of an entity are always maintained in the primary language. And as such all users, irrespective of their configured language, will see the primary language in the screens where an entity is created and maintained, and translations (including their preferred language) are shown in separate translation screens. However, if that same screen is accessed in view mode the description will be shown in their preferred language. Similarly, if viewing the entity in another UI - for example, viewing the item description in the purchase order details screen - the description will be shown in their preferred language.

Not Translated

The following information is available in English only:

- Documentation, including online help, release notes, and product guides
- Batch programs and messages
- Log files
- Configuration tools
- Demonstration data
- Training Materials

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[1] Additional support is also available for the following languages by adding your own translations using the tools described in this section for adding your own translations: Czech, Danish, Finnish, Hebrew, Norwegian, Thai, Albanian, Latin Bosnian, Bulgarian, Estonian, Latvian, Cyrillic Serbian, Lithuanian, Romanian, Slovakian, and Slovenian.

5

Managing Conflicts

Conflict checking is done when regular price changes and clearances are approved, unapproved, and optionally, when submitted. It can also occur when an approved price event is modified, depending on the change. This is because adding a new or updating an existing price event, or removing a previously approved event may impact the projected calculation of other price events that were previously approved, referred to as "future retail". When a conflict occurs, the user who took the action that resulted in conflict checking being executed (that is, the user approving the event) will have a notification raised and displayed in their task bar (🔔). Clicking on the icon on their task bar will provide a hyperlink to take the user to the event that has the conflict so that they can determine how to resolve the issue.

> **Note:** If the price event with the conflict was initiated from the batched upload or via web service a notification will not be raised.

Conflicts can also occur when an item is first ranged to a location if the inherited price changes and clearances for that item/location combination result in an invalid retail price. For these types of issues, a conflict is not raised. Instead, an exclusion is created for the item/location on the event that caused the conflict so that the other item/locations on the event are not impacted. This exclusion will be visible in the price change or clearance UI, when it occurs. The same errors that result in conflicts being raised for an event may also result in the exclusions being created.

Below is a list of the conflicts that may arise. For each conflict described below, the message displayed in the Conflicts screen is noted, as well as some recommended actions for resolving the conflict. The descriptions below are all in terms of approving or unapproving an event, but if you have the system option Run for Submit set to checked, then the approval related conflicts will also apply for events being submitted.

> **Note:** Conflict checking does not apply for promotions.

Multiple UOMs for Fixed Price Change

Ensures that, for a regular price change created with a change type of Fixed Price, only one selling unit of measure (UOM) will exist across all of the item/locations in the price change at the time the change goes into effect, if a UOM has not been specified for the event.

For example, if you have an item that is selling by eaches in one location in a zone and that same item is selling by kilos in another location in the zone, then creating a price change for the item at the zone level to set the new price to a set amount, say 2.00 USD,

without specifying a UOM for the price change, will raise a conflict, as it is assumed you don't want to sell that item for 2.00 USD per each and 2.00 USD per kilo at the two locations.

Message Displayed

Single Unit Price Change

Not all items/locations have the same selling UOM. A selling UOM must be selected for this price change.

Multi Unit Price Change

Not all items/locations have the same Multi Unit Selling UOM. A Multi Unit Selling UOM must be selected for this price change."

Recommended Action

To avoid this conflict, you should either specify a UOM for all fixed price events where you have items and/or locations that may have differences, or process those price changes by location to manage the updates separately.

If you have set the system option to use a single UOM across all of Pricing, then this conflict should never arise and the UOM defined on system options will be used. Similarly, if you don't price items in different selling units of measure. However, if Pricing is unable to find a single, unique UOM to use when validating the event for approval, a conflict is raised and the price event will not be able to be approved. If a single, unique UOM is found, the price event is updated to reflect that value.

Duplicate Price Change

Ensures that the new price change you are attempting to approve does not result in a duplication with another price change for the same item/location/effective date combination.

The only exception to this rule is when the effective date of the price change is equal to the current date. This is to allow for emergency corrections to an incorrectly setup price change that may have been inadvertently sent to the selling solutions. If this occurs, then the last one processed "wins" and that is the price change sent to the selling solutions.

Message Displayed

An approved price change for this item/location/date already exists.

Recommended Action

Review the conflicting event and determine which one you want to retain. If you want to retain the current event, then you will need to update the other event to have a different date, or move it out of approved status. Then, you can attempt to re-approve the current event. If you do not wish to retain the current event, you either update the effective date or delete it from the price change group. If you don't make any updates and the price change remains in worksheet or submitted status, it will eventually be deleted in a batch process based on the setting of the Expired Price Changes and Clearances system option.

Duplicate Reset

Ensures that the new clearance reset you are attempting to approve does not result in a duplication with another reset (or price change) for the same item/location/effective date combination.

Message Displayed

A reset cannot be added for an item/location that already has a reset in place.

Recommended Action

Review the conflicting event and determine which one you want to retain. Usually the current event can be deleted, as the previously created reset would suffice to reset the item to regular price, regardless of the system option setting. But if the conflicting event is a price change that also has the correct new regular price that should be used for the reset, that may be the preferred event to retain. Delete the event that you do not need. If you don't make any updates and the reset or price change remains in worksheet or submitted status, it will eventually be deleted in a batch process based on the setting of the Expired Price Changes and Clearances system option.

Approved Reset Not Allowed with Approved Markdown

Ensures that there are not approved markdowns and approved resets - both unexecuted - for an item/location combination at the same time regardless of effective date. This conflict can occur when you are attempting to approve either the markdown or the reset event. It can also occur even if the markdown has an effective date prior to the reset date, as it is required that all markdowns are executed before a reset is created and approved.

Additionally, this conflict also may occur when approving a price change, if you have the Reset Clearance with Price Change system option set to checked, as that means that the price change will also act as a reset event for an item/location on clearance when it goes into effect. It is generally assumed when you have this system set to checked you aren't also creating separate reset events, but if you do choose to do that, then a conflict could also occur if you approve a markdown when there is an unexecuted reset for the item/location with this system option set to checked.

Message Displayed

The messages displayed for this conflict differ slightly based on whether it is a markdown or a reset that is being approved and one whether the system option for Reset Clearance with Price Change is checked.

Reset Clearance with Price Change = Checked

If the conflict occurred when approving a price change, then "A price change cannot be approved for an item/location that has an approved clearance markdown in the future."

If the conflict occurred when approving a markdown, then "A markdown cannot be approved for an item/location that has an approved price change in the future." or "A markdown cannot be approved for an item/location that has an approved reset in the future."

If the conflict occurred when approving a reset, then "A reset cannot be approved for an item/location that has an approved markdown in the future."

Reset Clearance with Price Change = Unchecked

If the conflict occurred when approving a markdown, then "A markdown cannot be approved for an item/location that has an approved reset in the future."

If the conflict occurred when approving a reset, then "A reset cannot be approved for an item/location that has an approved markdown in the future."

Recommended Action

This often occurs when you are trying to reset an item to regular price too close to the end of its current season and some zones may not have yet finished executing their markdowns for the current season. First, consider if the items need to be reset - it is not required to reset an item to regular price. But, if you do need to reset it, then it is recommended that you wait to reset item/locations off clearance until it is closer to the time that you want to reintroduce the item for a new season to avoid this conflict.

If you determine that you need to add another markdown for an item/location combination that has an approved reset, then you need to first remove the reset (or price change) from the future retail timeline by moving it back to a worksheet status or deleting it and then you can approve your markdown. Once the additional markdown has been executed, you can re-approve the reset event or price change.

Alternatively, you can remove just the current item/location combinations that had the conflict with the reset (or price change) from the markdown by changing the zone used for the event. This may work for situations where the reset (or price change) was created using zones from a different group than is being used for the clearance or the parent item has SKUs at different points in their lifecycle.

Otherwise, if the markdown is the issue and it is the reset (or price change) that needs to be approved, them the markdown should be unapproved or deleted until after the reset (or price change) executes, at which point it can then be re-approved.

Price Change Allowed Only After Clearance Reset

Ensures that price changes created for item/locations either go into effect before the item goes on clearance, or will go into effect after the item has been reset from clearance. This conflict could arise when approving either a price change or a clearance event.

> **Note:** If the Reset Clearance with Price Change system option is checked, then the price change is also considered a reset, so this rule would not be triggered unless two events had the same effective date.

Message Displayed

The price event would cause a price change to take effect during a clearance.

Recommended Action

Ensure your price change has an effective date either before the first markdown for an item/location, or on or after the effective date for the reset event. Adjust the dates of either the price change, markdown, or reset in order to resolve the conflict.

Future Retail Cannot Be Negative

Occurs when the addition or removal of a price event from the price timeline would result in the calculated future price for an item to be calculated as a negative price. For

example, you have an item/location with a current price of 10.00 USD, and an approved price change that is due to go into effect in 7 days that will increase the price 100% to 20.00 USD, and also an approved price change that is due to go into effect in 14 days that will decrease the price by 11.00 USD to 9.00 USD. If you were to unapproved the price change that is due to go into effect in 7 days, then the second price change would have its future retail recalculated to -1.00 USD, which is not allowed.

Message Displayed

This price event will result in the retail price being negative on a future date.

Recommended Action

Instead of unapproving a price event to make a change, change the event without unapproving it, if you have privileges to do so. Or if you need to unapproved the price event to either update the dates or price because you have insufficient privileges to update approved price events, then you will need to adjust the future price change first - or move that event to worksheet status - prior to making your update. It is also helpful to use consistent price change types for changing price, where possible, to prevent confusion on price calculation due to varying change types as were used in the example above. For example, consider always using a percent change or fixed price.

Initial Markdown Increases Current Regular Price

The first markdown must be less than or equal to the regular retail. This can occur when a fixed price markdown is used, instead of a discount type of percent or amount, and the regular retail price that will be in effect at the time of the markdown's effective date hasn't been properly considered.

If you have the system option Clearance Retail must be less than or equal to Regular Retail unchecked, then this rule will not be executed. This is usually done to correct errors in price due to a previous price change.

Message Displayed

The clearance retail must be less than regular retail for this item/location.

Recommended Action

Ensure you've reviewed all pending price changes for the item/location prior to creating the markdown. Update the price you are using for your fixed price markdown. Or use a discount type of percent off or amount off for the markdown.

Markdown Increases Current Clearance Price

Once an item is on clearance, all subsequent markdowns must decrease the price of the item. This can occur when a fixed price markdown is used, instead of a discount type of percent or amount, and the clearance price that will be in effect at the time of the markdown's effective date hasn't been properly considered.

If you have the system option Clearance Retail must be less than Previous Markdown unchecked, then this rule will not be executed. This is usually done to correct errors in price due to a previous markdown.

Message Displayed

Clearance retail must always decrease.

Recommended Action

Ensure you've reviewed all pending markdowns for the item/location prior to creating the markdown. Update the price you are using for your fixed price markdown. Or use a discount type of percent off or amount off for the markdown.

Resetting Item Not on Clearance

This conflict is raised when an item/location not currently on clearance is placed on a reset event. This helps prevent more than one reset from executing for an item/location, potentially sending confusing updates to the selling solutions. This could occur regardless of the setting of the system option Reset Clearance with Price Change. However, if that system option is checked, then creating a reset outside of a price change could also raise a conflict with a price change that is scheduled to go into effect prior to the reset.

Message Displayed

This item/location will not be on clearance at the time of this reset.

Recommended Action

Remove the item/location from the unnecessary reset, move the reset to worksheet status, or delete it.

New Item Location

When new item/location relationships are created in Merchandising, Pricing helps to provide the correct selling price to Merchandising for the new relationship in real time, but the establishment of the future retail price, as well as inheritance of new events that item/location may now be eligible for, will only be available after a background process has been run on the Pricing side. If you try to create and approve a price change or clearance that impacts this new item/location relationship prior to this process running you may encounter the error below.

Message Displayed

The Item Location combination has not yet been fully brought into Pricing. Please try again at a later time.

Recommended Action

You can still create your event, but will need to wait until after the process has been run to approve it. To prevent this issue from occurring in the future, you could look at modifying the frequency at which this background process is executed.

Data Locked

If another user has initiated the conflict checking process for the same event at the same time that you are, you may incur an error when trying to approve or save updates to an already approved event.

Message Displayed

Unable to process the price event at this time due to data being locked by another price event.

Recommended Action

First, if another user is updating the event, then best practice is to wait a few minutes for their updates to be completed and try again to see if you still need to make an update. If this continues to occur when you try again later, then you may need to contact your support team for assistance.

Technical Issues

It should be an exception, but if some type of processing error occurs in the background processing during conflict checking, you may see an error that suggests you need to contact the system administrator.

Messages Displayed

An unexpected error occurred during conflict checking. Contact your system administrator and provide the associated price event ID to resolve the issue.

An unexpected error occurred during processing. Contact your system administrator and provide the associated price event ID to resolve the issue.

Recommended Solution

As the messages state, if this occurs, you should contact the system administrator providing the price event ID that was being approved at the time that the issue occurred, if known.

6

Simplified Pricing

For retailers who are implementing the Merchandising, but that have their own pricing solution that will be used to manage price, as well as provide the latest updates to their selling solutions, an option is available to access limited functionality in Pricing to manage initial pricing of new items and also to keep Merchandising updated for any regular price changes or clearance markdowns and resets. If running Pricing in this mode, then the following are the key features that will be available:

- Price zone setup and configuration, as well as initial zone group definitions for merchandise hierarchies

- Bulk load of price changes, clearance markdowns, and clearance resets from an external source. All price events must be created using a fixed price.

- Execution of price events into Merchandising to record markdowns, to update price history and item/location price details. This also includes emergency price events.

- Access to a subset of system options for configuration of the above features

- Access to a subset of batch processes related to the above-mentioned functionality.

However, when running in simplified mode, Pricing will not calculate a future retail, nor will it perform any conflict checking on price events imported from an external system, as it is assumed that processing is done by the system initiating the change. Promotions also cannot be created.

Extracts to selling solutions for price changes and clearance markdowns and resets are also not supported in Simplified Pricing mode. It is assumed that the solution you are using to manage pricing will communicate changes in regular and clearance price, as well as all promotional pricing to your selling solutions.

7

Data Access Schema Configuration

The Data Access Schema (DAS) is a way for certain tables in the production database for the Merchandising suite, including Pricing, to be replicated to an on-premise or hosted environment to provide you with more direct access to your production data in order to build extensions, integration, custom reporting, and so on. The DAS uses Oracle GoldenGate, which is a comprehensive software package for real-time data integration and replication in heterogeneous IT environments. If you purchased the subscriber license for using GoldenGate as part of your subscription, then once you have installed and configured your target environment, you can configure which of the tables available for replication you want replicated to your target database. All tables in DAS are accessed via database views. Views are used to ensure that, even if a column it dropped from a base table or no longer used, the view continues to include all columns, so that any integrations or other extensions built using the data will not fail. Although they may need to be altered to remain functionally correct.

The list of tables that are available to be replicated are found in the DAS data model, which can be downloaded from My Oracle Support by accessing note 2200398.1. For details on configuring your target environment and adding tables to DAS, see the My Oracle Support note 2283998.1.