

**Oracle® Retail Merchandising Foundation Cloud
Service**

Deal and Cost Change User Guide

Release 16.0.030

F11684-01

June 2019

F11684-01

Copyright © 2019, Oracle and/or its affiliates. All rights reserved.

Primary Author:

Contributing Author:

Contributor:

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Value-Added Reseller (VAR) Language

Oracle Retail VAR Applications

The following restrictions and provisions only apply to the programs referred to in this section and licensed to you. You acknowledge that the programs may contain third party software (VAR applications) licensed to Oracle. Depending upon your product and its version number, the VAR applications may include:

- (i) the **MicroStrategy** Components developed and licensed by MicroStrategy Services Corporation (MicroStrategy) of McLean, Virginia to Oracle and imbedded in the MicroStrategy for Oracle Retail Data Warehouse and MicroStrategy for Oracle Retail Planning & Optimization applications.
- (ii) the **Wavelink** component developed and licensed by Wavelink Corporation (Wavelink) of Kirkland, Washington, to Oracle and imbedded in Oracle Retail Mobile Store Inventory Management.
- (iii) the software component known as **Access Via**™ licensed by Access Via of Seattle, Washington, and imbedded in Oracle Retail Signs and Oracle Retail Labels and Tags.
- (iv) the software component known as **Adobe Flex**™ licensed by Adobe Systems Incorporated of San Jose, California, and imbedded in Oracle Retail Promotion Planning & Optimization application.

You acknowledge and confirm that Oracle grants you use of only the object code of the VAR Applications. Oracle will not deliver source code to the VAR Applications to you. Notwithstanding any other term or condition of the agreement and this ordering document, you shall not cause or permit alteration of any VAR

Applications. For purposes of this section, "alteration" refers to all alterations, translations, upgrades, enhancements, customizations or modifications of all or any portion of the VAR Applications including all reconfigurations, reassembly or reverse assembly, re-engineering or reverse engineering and recompilations or reverse compilations of the VAR Applications or any derivatives of the VAR Applications. You acknowledge that it shall be a breach of the agreement to utilize the relationship, and/or confidential information of the VAR Applications for purposes of competitive discovery.

The VAR Applications contain trade secrets of Oracle and Oracle's licensors and Customer shall not attempt, cause, or permit the alteration, decompilation, reverse engineering, disassembly or other reduction of the VAR Applications to a human perceivable form. Oracle reserves the right to replace, with functional equivalent software, any of the VAR Applications in future releases of the applicable program.

Contents

Send Us Your Comments	ix
Preface	xi
Audience	xi
Documentation Accessibility	xi
Customer Support	xi
Review Patch Documentation	xii
Improved Process for Oracle Retail Documentation Corrections	xii
Oracle Retail Documentation on the Oracle Technology Network	xii
Conventions	xii
 1 Create a Cost Change	
Cost Change by Item	1-1
Change Costs by Item	1-1
Header	1-3
Items	1-3
Bracket Details	1-3
Add Items to a Cost Change	1-4
Mass Update	1-5
Add Bracket Details	1-6
Cost Change by Location	1-6
Header	1-7
Items	1-8
Locations	1-8
Bracket Details	1-8
Cost Change by Location Toolbar	1-8
Create Cost Changes by Location	1-8
Add Items to a Cost Change	1-8
Mass Update Items	1-10
Add Locations to a Cost Change	1-11
Mass Update Locations	1-11
 2 Manage Cost Changes	
Cost Change Reasons	2-2
Add a Cost Change Reason	2-3

Update a Cost Change Reason	2-3
Delete a Cost Change Reason	2-4
Upload Changes	2-4
Search for a Cost Change	2-4
Search for a Cost Change Through the Basic Search Criteria	2-5
Search for a Cost Change Through Advanced Search Criteria	2-5
Results	2-6
Cost Change Search Toolbar	2-6
Update a Cost Change	2-6
View a Cost Change	2-7
Approve a Cost Change	2-7
Submit a Cost Change for Approval	2-8
Approve a Cost Change	2-8
Reject a Cost Change	2-9
Cancel a Cost Change	2-9

3 Upload/Download Cost Changes from a Spreadsheet

Download from Staging	3-1
Upload from Staging	3-2
Download from Merchandising	3-3
Upload from a File	3-3
View Issues	3-4

4 Deals Overview

Types of Deals	4-1
Create a Deal	4-2
Add Deal Header Information	4-4
Add Bill Back and Financials Details	4-5
Add a Component	4-7
Add Deal Components	4-7
Promotions	4-9
Deal Component Types	4-9
Add a Deal Component Type	4-10
Update a Deal Component Type	4-10
Delete a Deal Component Type	4-10
Upload Changes	4-10
Add Buy/Get Details	4-11
Add Buy/Get Item	4-11
Edit a Deal Component	4-13
Delete a Deal Component	4-13
Add Items and Locations	4-13
Item/Locations - View Menu and Icons	4-13
Add the Item/Locations to a Deal	4-14
Delete an Item/Location	4-15
Add Thresholds and Discounts	4-15
Add the Thresholds of a Deal	4-16
Edit the Threshold of a Deal	4-17

Delete the Threshold.....	4-17
Create a Purchase Order-specific Deal	4-17
Manage Deals	4-18
Search for a Deal.....	4-19
Search for a Deal Through the Basic Search Criteria	4-19
Search for a Deal Through the Advanced Search Criteria	4-20
Results.....	4-22
Deal Search Toolbar	4-22
Edit a Deal	4-23
View a Deal	4-23
Create a Deal	4-23
Deal Toolbar.....	4-23
Deal - More Actions Menu.....	4-23
Approve a Deal.....	4-24
Change the Status of a Deal.....	4-24
Submit a Deal.....	4-24
Approve a Deal	4-25
Reject a Deal.....	4-25
Close a Deal.....	4-26
Add Comments to a Deal.....	4-26
Deal Performance	4-26
View Deal Performance Page.....	4-26
Deal Performance Header.....	4-27
Totals.....	4-28
Edit a Total of a Deal Component	4-28
Periods	4-30
Periods - Actions Menu and Icons	4-30
Edit Periods of a Deal Component.....	4-30
Proof of Performance	4-31
View/Create/Edit Proof of Performance Page	4-31
Proof of Performance Header	4-32
Manage Terms	4-32
Add Proof of Performance Terms Definition	4-32
Edit Proof of Performance Terms Definition	4-33
Delete Proof of Performance Terms Definition	4-34
Manage Fulfillment.....	4-34
Add Proof of Performance Fulfillment.....	4-34
Delete Proof of Performance Fulfillment	4-35
Manage Referenced Promotions	4-35
Add Promotions to a Deal	4-35
Delete Deal Promotions	4-35
View Threshold Revisions	4-36
View Deal Dates	4-36
View Deal Dates	4-36
Create a Fixed Deal	4-37
Create a Fixed Deal	4-38
Fixed Deal Header	4-39

Merchandise Hierarchy	4-40
Add Merchandise Hierarchy	4-40
Delete Merchandise Hierarchy	4-41
Locations	4-41
Create Locations to a Fixed Deal	4-41
Delete Locations	4-42
Fixed Deal Toolbar	4-42
Create from an Existing Deal	4-42
Manage Fixed Deals	4-43
Manage a Fixed Deal	4-44
Search for a Fixed Deal	4-44
Search For a Fixed Deal Through the Basic Search Criteria	4-44
Search a Fixed Deal Through the Advanced Search Criteria	4-45
Results	4-46
Fixed Deal Search Toolbar	4-46
Edit a Fixed Deal	4-46
View a Fixed Deal	4-47
Activate/Deactivate a Fixed Deal	4-48
Activate a Fixed Deal	4-48
Deactivate a Fixed Deal	4-48
Delete a Fixed Deal	4-48
Proof of Performance	4-48
Manage Terms	4-48
Add a Fixed Deal Terms Definition	4-48
Edit Fixed Deal Proof of Performance Terms Definition	4-49
Delete a Fixed Deal Proof of Performance Terms Definition	4-50
Manage Fulfillment	4-50
Add a Fixed Deal Proof of Performance Fulfillment	4-50
Delete a Fixed Deal Proof of Performance Fulfillment	4-51
Manage Referenced Promotions	4-51
Add Promotions to a Fixed Deal	4-51
Delete Fixed Deal Promotions	4-52

Send Us Your Comments

Merchandising Foundation Cloud Service Deal and Cost Change User Guide, Release 16.0.030

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

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

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

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

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

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

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

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

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

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 Merchandising Foundation Cloud Service. This includes merchandisers, buyers, business analysts, and administrative personnel.

Documentation Accessibility

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

Access to Oracle Support

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

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL: <https://support.oracle.com>

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 16.0) or a later patch release (for example, 16.0.030). 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:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.

Convention	Meaning
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Create a Cost Change

Cost Management refers to the procedure of maintaining the cost of the different items that are used in the retailer's setup and allow the user to manage any cost changes that occur during the lifecycle of these items.

You can manage cost changes in two different ways:

- [Change Costs by Item](#)

The Cost Change by Item option is used when a cost change needs to be defined at the item/supplier/country of sourcing level.

- [Cost Change by Location](#)

The Cost Change by Location option is used when a cost change needs to be defined at the item/supplier/country of sourcing/location level.

Cost Change by Item

Open the Cost Change or Cost Change by Item page:

From the Tasks menu, select **Cost > Cost Change by Item**. The Cost Change by Item page appears.

Additionally, you can access the Cost change through the Item Search page.

- From the Tasks menu, select **Items > Manage Items**. The Item Search page appears, search for the desired item.
 - In the Results section, select **Actions > Cost Change** or use the **Cost Change** button. The Cost Change page appears.
1. In the **Cost Change** field, enter a description for the change.
 2. In the **Reason** field, enter, select or search for a reason code for the cost change.
 3. In the **Effective Date** field, enter the effective date for the cost change, or use the Calendar icon to select a date.

Change Costs by Item

The initial cost of an item is established at item set-up. The cost of an item can be adjusted in the item record till the item is approved. Any cost changes past that will need to be handled through the cost change pages.

When submitted through EDI, you review the cost change, then submit the cost change for approval.

When entered manually, you enter the cost change, an event description, an effective date and a reason code. Then you can submit the cost change for approval.


Note: You cannot create a cost change for a transformed sellable item.

After you approve the cost change, the item/supplier cost record is updated and any outstanding purchase orders that have not been received are recalculated, if designated on the cost change, based on the updated cost.

You can access the Cost Change by Item page in different ways:

1. From the Tasks menu, select **Cost > Create Cost Change by Item**. The Cost Change by Item page appears.

You can also access the Cost Change by Item page through the Cost Change Search.

1. From the Tasks menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
4. In the Results section, select a cost change.
5. Select **Actions > Edit**, or use the Edit icon . The Cost Change by Item page appears.

Additionally, you can access the Cost change through the Item Search page.

1. From the Tasks menu, select **Items > Manage Items**. The Item Search page appears.
2. Search for the desired item.
3. In the Results section, select a record.
4. Then select **Actions > Cost Change**, or use the **Cost Change** button. The Cost Change by Item page appears.

The page includes the following sections:

- [Header](#)
- [Items](#)
- [Bracket Details](#)

Figure 1–1 Cost Change by Item Page

Header

The cost change header section includes the following fields.

Table 1–1 Cost Change Header - Fields and Description

Fields	Description
Cost Change	Enter a description for the cost change. This field contains the cost change number by default.
Reason	Enter, select or search for the reason for the cost change.
Status	The cost change status is displayed.
Effective Date	Enter the date on which the cost changes become effective, or use the Calendar icon to select a date.

Items

In the Items section you can add, delete and mass update items for the cost change.

Bracket Details

The Bracket Details section is only available, if bracket costing is applicable. The table contains the bracket details for the highlighted item for a supplier that supports bracket costing.

For items with brackets defined, the old unit cost and the new unit cost information is shown in the Bracket Details section and not in the Items section.

For items with no brackets defined, the cost information is displayed in the Item section and the Bracket Details section remains collapsed.

Add Items to a Cost Change

To add items for a cost change, follow the steps below.

1. In the Cost Change or Cost Change by Item page, go to Items section.
2. Select **Actions > Add**, or use the Add icon **+**. The Add Items pop-up appears.

Figure 1–2 Add Items Pop-up

3. In the Select Supplier or Items section, enter the following fields.
 - a. In the **Supplier Site** field, enter, select or search for the supplier site.
 - b. In the **Country of Sourcing** field, enter, select or search for the sourcing country.
 - c. In the **Item** field, enter, select or search for the item.

Note: If you have accessed the Cost Change page through the Item Search, the selected item is displayed in this field. You cannot change the item and the **Item List** field is disabled.

- d. In the **Item List** field, enter, select or search for the item list.
 - e. Select the **Expand Parent** checkbox to indicate that all the child items linked with the selected parent item need to be added to the cost change.
4. In the Update Cost section, select one of the following radio buttons.
 - a. Select **Change by Percent** to indicate the cost change in percent.
The **Percent** field enables, enter the percent by which the cost changes. Use a negative symbol (-) before the percent to indicate a decrease in cost by percent.
 - b. Select **Change by Amount** to indicate the cost change by a certain amount.
The **Amount** field enables, enter the amount by which the cost changes. Use a negative symbol (-) before the amount to indicate a decrease in cost by amount. Then enter, select or search for the currency.
 - c. Select **Enter New Value** to enter a new unit cost value for the item.

The **New Value** field enables, enter the new cost of the item. The amount entered becomes the cost of all items selected for the cost change. Then enter, select or search for the currency.

- d. Select the **Recalculate Order** checkbox to recalculate any outstanding purchase orders that have not been received based on the updated cost.
5. In the **Apply To** section, select the type of adjustment. Select either **Unit Cost** or **Cost on Effective Date**.
6. Then choose one of the following options.
 - Click **OK** to add the item.
 - Select **OK and Add Another** to add additional items.
 - Click **Cancel** to reject all entries and close the pop-up.

Mass Update

Use the **Mass Update** option in the actions menu to apply the cost changes to the selected items in the table. To update the costs for multiple items, follow the steps below.

1. In the Cost Change or Cost Change by Item page, go to the Items section.
2. Mark the records you want to update in the table. Click the **Mass Update** button. The Mass Update pop-up appears.

Figure 1–3 Mass Update Pop-up

3. In the **Update Cost** section, select one of the following radio buttons.
 - a. Select **Change by Percent** to indicate the cost change in percent.
The **Percent** field enables, enter the percent by which the cost changes. Use a negative symbol (-) before the percent to indicate a decrease in cost by percent.
 - b. Select **Change by Amount** to indicate the cost change by a certain amount.
The **Amount** field enables, enter the amount by which the cost changes. Use a negative symbol (-) before the amount to indicate a decrease in cost by amount. Then enter, select or search for the currency.
 - c. Select **Enter New Value** to enter a new unit cost value for the item.
The **New Value** field enables, enter the new cost of the item. The amount entered becomes the cost of all items selected for the cost change. Then enter, select or search for the currency.
 - d. Select the **Recalculate Order** checkbox to recalculate any outstanding purchase orders that have not been received based on the updated cost.

4. In the Apply To section, select the type of adjustment. Select either **Unit Cost** or **Cost on Effective Date**.
5. Then choose one of the following options.
 - Click **OK** to add the changes for the selected items.
 - Click **Cancel** to reject all entries and close the pop-up.

Add Bracket Details

This option is only available, if there are already existing brackets set up in the system. A location may have multiple brackets linked to it, all of which are added when the location is added. You can delete one or more of the brackets. Later, you can add these deleted brackets again by using the Add option.

To add the bracket details of cost change:

1. In the Cost Change or Cost Change by Item page, go to the Bracket Details section.
2. Select **Actions > Add**, or click the Add icon **+**. The Add Brackets pop-up appears.

Figure 1–4 Add Brackets Pop-up

Bracket	Default	Unit Cost
11.00	N	100

3. Select one or more of these brackets to add them back to the current cost change.
4. Then choose one of the following option.
 - Click **OK** to add the brackets to the current cost change.
 - Click **Cancel** to close the pop-up.

Cost Change by Location

The Cost Change by Location option is used when a cost change needs to be defined at the item/supplier/country of sourcing/location level.


When submitted through EDI, you review the cost change, then submit the cost change for approval.

When entered manually, you enter the cost change, an event description, an effective date and a reason code. Then submit the cost change for approval.

Note: You cannot create a cost change for a transformed sellable item.

After you have approved the cost change, the item/supplier cost record is updated and any outstanding purchase orders that have not been received are recalculated.

You can access the Cost Change by Item page in different ways:

1. From the Tasks menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
4. In the Results section, select a cost change by location.
5. Select **Actions > Edit**, or use the Edit icon . The Cost Change by Location page appears.

The page includes the following sections:

- [Header](#)
- [Items](#)
- [Locations](#)
- [Bracket Details](#)
- [Cost Change by Location Toolbar](#)

Figure 1–5 Cost Change by Location Page

Cost Change by Location x

Cost Change 965001 Cost Change with Brack Cst Status Worksheet

Reason 59 New bracket Effective Date 10/4/16

Items

Actions View + - Detach Wrap Mass Update

Item	Description	Supplier Site Name	Country	Primary
125400008	New Item with Bracket Costing	Supplier_Site	US	<input checked="" type="checkbox"/>

Locations

Actions View + - Detach Wrap Mass Update

Type	Location	Name	Primary Location	Location Status	Unit Cost Current	Unit Cost New	Cost UOM	Currency	Recalculate Orders
Store	912	Demo Store	<input type="checkbox"/>	Active	11.6150	11.0000	EA	USD	<input type="checkbox"/>
Warehouse	11111	Physical_Warehouse	<input checked="" type="checkbox"/>	Active			EA	USD	<input type="checkbox"/>

Bracket Details

Submit More Actions Save Save and Close Cancel

Header

The cost change header section includes the following fields.

Table 1–2 Cost Change Header - Fields and Description

Fields	Description
Cost Change	Enter a description for the cost change. This field contains the cost change number by default.
Reason	Enter, select or search for the reason for the cost change.
Status	The cost change status is displayed by default.
Effective Date	Enter the date on which the cost changes become effective, or use the Calendar icon to select a date.

Items

In the Items section you can add, delete and mass update items for the cost change.

Locations

The Locations section contains the location details for the selected record in the Items section. You can add, delete and mass update locations for the cost change.

Bracket Details

The Bracket Details section is only available, if bracket costing is applicable. The table contains the bracket details for the highlighted item for a supplier that supports bracket costing.

For items with brackets defined, the old unit cost and the new unit cost information is shown in the Bracket Details section and not in the Items section.

For items with no brackets defined, the cost information is displayed in the Item section and the Bracket Details section remains collapsed.

Cost Change by Location Toolbar

For information about the toolbar, see “Screen Level Action - Icons and Buttons” in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

Create Cost Changes by Location

To create a cost change by location, follow the steps below.

Open the Cost Change or Cost Change by Item page:

1. From the Tasks menu, select **Cost > Create Cost Change by Location**. The Cost Change by Location page appears.
2. In the **Cost Change** field, enter a description for the change.
3. In the **Reason** field, enter, select or search for a reason code for the cost change.
4. In the **Effective Date** field, enter the effective date for the cost change, or use the Calendar icon to select a date.

Add Items to a Cost Change

To add items to a cost change, follow the steps below.

1. In the Cost Change by Location page, go to the Items section.


2. Select **Actions > Add**, or use the Add icon . The Add Items pop-up appears.

Figure 1–6 Add Items Pop-up

3. In the Select Supplier or Items section, enter the following fields.
 - a. In the **Supplier Site** field, enter, select or search for the supplier site.
 - b. In the **Country of Sourcing** field, enter, select or search for the sourcing country.
 - c. In the **Item** field, enter, select or search for the item.

Note: If you have accessed the Cost Change page through the Item Search, the selected item is displayed in this field. You cannot change the item and the **Item List** field is disabled.

- d. In the **Item List** field, enter, select or search for the item list.
 - e. Select the **Expand Parent** checkbox to indicate that all the child items linked with the selected parent item need to be added to the cost change.
4. In the Update Cost section, select one of the following radio buttons.
 - a. Select **Change by Percent** to indicate the cost change in percent.
The **Percent** field enables, enter the percent by which the cost changes. Use a negative symbol (-) before the percent to indicate a decrease in cost by percent.
 - b. Select **Change by Amount** to indicate the cost change by a certain amount.
The **Amount** field enables, enter the amount by which the cost changes. Use a negative symbol (-) before the amount to indicate a decrease in cost by amount. Then enter, select or search for the currency.
 - c. Select **Enter New Value** to enter a new unit cost value for the item.
The **New Value** field enables, enter the new cost of the item. The amount entered becomes the cost of all items selected for the cost change. Then enter, select or search for the currency.
 - d. Select the **Recalculate Order** checkbox to recalculate any outstanding purchase orders that have not been received.

5. In the Apply To section, select the type of adjustment. Select either **Unit Cost** or **Cost on Effective Date**.
6. Then choose one of the following options.
 - Click **OK** to add the item.
 - Select **OK and Add Another** to add additional items.
 - Click **Cancel** to reject all entries and close the pop-up.

Mass Update Items

Use the **Mass Update** option in the actions menu to apply the cost changes to the selected items in the table. To update the costs for multiple items, follow the steps below.

1. In the Cost Change by Location page, go to the Items section.
2. Mark the records you want to update in the table. Click the **Mass Update** button. The Mass Update pop-up appears.

Figure 1–7 Items - Mass Update Pop-up

3. In the Update Cost section, select one of the following radio buttons.
 - a. Select **Change by Percent** to indicate the cost change in percent.
The **Percent** field enables, enter the percent by which the cost changes. Use a negative symbol (-) before the percent to indicate a decrease in cost by percent.
 - b. Select **Change by Amount** to indicate the cost change by a certain amount.
The **Amount** field enables, enter the amount by which the cost changes. Use a negative symbol (-) before the amount to indicate a decrease in cost by amount. Then enter, select or search for the currency.
 - c. Select **Enter New Value** to enter a new unit cost value for the item.
The **New Value** field enables, enter the new cost of the item. The amount entered becomes the cost of all items selected for the cost change. Then enter, select or search for the currency.
 - d. Select the **Recalculate Order** checkbox to recalculate any outstanding purchase orders that have not been received.
4. In the Apply To section, select the type of adjustment. Select either **Unit Cost** or **Cost on Effective Date**.
5. Then choose one of the following options.
 - Click **OK** to add the changes for the selected items.
 - Click **Cancel** to reject all entries and close the pop-up.

Add Locations to a Cost Change

To add the locations to a cost change:

1. In the Cost Change by Location page, go to the Locations section.
2. Select Actions > **Add**, or click the Add icon **+**. The Add Locations pop-up appears.

Figure 1–8 Add Locations Pop-up

The 'Add Locations' pop-up dialog box contains a table titled 'Select Locations'. The table has three columns: 'Location', 'Name', and 'Unit Cost'. It lists three locations: 9121 (Demo Warehouse, 30.0000), 875 (Oracle Retail Sample Store 4, 30.0000), and 850 (Oracle Retail Sample Store 1, 30.0000). At the bottom right are 'OK' and 'Cancel' buttons.

Location	Name	Unit Cost
9121	Demo Warehouse	30.0000
875	Oracle Retail Sample Store 4	30.0000
850	Oracle Retail Sample Store 1	30.0000

3. All locations initially removed from the cost change, because no new cost was specified, are displayed.
4. Select one or more locations in the table.
5. Then select one of the following options.
 - Click **OK** to add the locations to the cost change and close the pop-up.
 - Click **Cancel** to reject all entries and close the pop-up.

Mass Update Locations

Use the **Mass Update** option in the actions menu to apply the cost changes to the selected locations in the table. To update the costs for multiple locations, follow the steps below.

1. In the Cost Change by Location page, go to the Locations section.
2. Mark the records you want to update in the table. Click the **Mass Update** button. The Mass Update pop-up appears.

Figure 1–9 Locations - Mass Update Pop-up

The 'Mass Update' pop-up dialog box is used to update costs for multiple locations. It includes a 'Location' section with dropdowns for 'Warehouse' (set to 999991) and 'WAREHOUSE 2'. Below this is a 'Bracket' dropdown. The 'Update Cost' section has three radio buttons: 'Change by Percent' (selected), 'Change by Amount', and 'Enter New Value'. A 'Percent' input field shows '0.50'. The 'Apply To' section has two radio buttons: 'Unit Cost' (selected) and 'Cost on Effective Date'. At the bottom are 'OK', 'OK and Edit Another', and 'Cancel' buttons.

3. In the Location section, select the location information for the mass update.
4. In the Update Cost section, select one of the following radio buttons.

- a. Select **Change by Percent** to indicate the cost change in percent.
The **Percent** field enables, enter the percent by which the cost changes. Use a negative symbol (-) before the percent to indicate a decrease in cost by percent.
 - b. Select **Change by Amount** to indicate the cost change by a certain amount.
The **Amount** field enables, enter the amount by which the cost changes. Use a negative symbol (-) before the amount to indicate a decrease in cost by amount. Then enter, select or search for the currency.
 - c. Select **Enter New Value** to enter a new unit cost value for the item.
The **New Value** field enables, enter the new cost of the item. The amount entered becomes the cost of all items selected for the cost change. Then enter, select or search for the currency.
5. In the Apply To section, select the type of adjustment. Select either **Unit Cost** or **Cost on Effective Date**.
 6. Then choose one of the following options.
 - Click **OK** to add the changes for the selected location(s).
 - Click **OK and Edit Another** to edit additional locations.
 - Click **Cancel** to reject all entries and close the pop-up.

Manage Cost Changes

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

- Search for cost changes by various search criteria
- View the search results
- View cost change information
- Create cost changes by item or location
- Edit cost change information
- View cost changes

You can access the Cost Change Search page from the Task menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.

The Cost Change Search page contains the following sections.

- Search

For more information about how to search for cost changes, see the [Search for a Cost Change](#) section.

- [Results](#)
- [Cost Change Search Toolbar](#)

Figure 2–1 Cost Change Search Page

Cost Change Search

Search

Match ☒ All ☐ Any

Cost Change

Description

Status

Effective Date

Supplier Site

Department

Class

Subclass

Item

Advanced

Saved Search

Default

Search

Reset

Save...

Results

Actions

View

Detach

Change By Location

Cost Change	Description	Reason	Reason Description	Status	Effective Date	Approved Date	Created Date	Created By
15001	Cost Change	10	External Cost Change	Approved	7/11/16	7/3/16	8/1/16	RMS
20003	Cost Change 9	10	External Cost Change	Approved	7/23/16	7/13/16	8/4/16	RMS
20009	Demo Cost Change 003	10	External Cost Change	Approved	7/24/16	7/13/16	8/5/16	RMS
20010	Demo Cost Change 004	10	External Cost Change	Approved	7/25/16	7/13/16	8/5/16	RMS
20012	Demo Cost Change 015	10	External Cost Change	Worksheet	7/28/16		8/5/16	RMS
15003	Cost Change	10	External Cost Change	Approved	7/13/16	7/3/16	8/1/16	RMS
15005	Cost Change	10	External Cost Change	Approved	7/22/16	7/3/16	8/1/16	RMS
20011	Demo Cost Change 009	10	External Cost Change	Worksheet	7/29/16		8/5/16	RMS
15004	Cost Change	10	External Cost Change	Approved	7/15/16	7/3/16	8/1/16	RMS

Done

Cost Change Reasons

Cost change reasons are a required attribute on any supplier cost changes created in Merchandising. New codes can be added as desired by implementation to configure the solution to meet your company’s needs. There are also several that are automatically added to certain systematic events in the solution. Note: the system required codes cannot be deleted, but can have their descriptions updated, if desired. The system required reason codes are:

Code	Description
1	New bracket
2	New bracket structure
3	Default bracket change
4	Primary Supplier Changed
5	Primary Country Changed
6	Primary Loc Changed
7	ItemLoc Supplier/Country Chg
8	RCA cost change
9	Tax Law Changed

The list of valid cost change reasons is defined by a configurable list of codes and descriptions. That list is managed through spreadsheet download and upload processes. These processes are accessed through the main **Merchandising** task list under **Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data**.

To add, update, or remove cost change reasons:

1. Select the **Price and Cost** template type in the Download Data screen.
2. Select the **Cost Change Reasons** template.
3. Click the **Download** button.
4. When prompted do one of the following:
 - Open the .ods file.
 - Save the file, then open it in the spreadsheet application of your choice.

Once opened, there are two sheets that can be modified:

- **Cost Change Reasons** - Create, update, or delete existing reason in this tab.
- **Cost Change Reasons Translations** - Add translated values in this tab.

Add a Cost Change Reason

To add a new reason:

1. Open the **Cost Change Reasons** tab.
2. Select the **Create** action type in a blank line.
3. Enter the **Description** for the reason in the primary language (up to 120 characters).

Note: The primary language is defined in the Merchandising system options.

4. Enter a unique code for the reason (up to 2 digits).
5. If necessary, add reason descriptions in other languages:
 1. Select the **Cost Change Reasons Translations** tab.
 2. Select the **Create** action type in a blank line.
 3. Enter the language for the translated description.
 4. Enter the code for the new reason.
 5. Enter the translated description (up to 120 characters).

Update a Cost Change Reason

If you would like to update any details for existing reasons, a similar process will be followed as that described above for creating new reasons. First, download the spreadsheet, and then navigate to the tab where you would like to make your updates.

The following columns can be updated in each tab:

- Cost Change Reasons – Description
- Cost Change Reasons Translations – Description

To update a reason:

1. Select the **Update** action type in the row to update.
2. Enter the correct description.

Delete a Cost Change Reason

To delete a reason that is no longer used by your business, select **Delete** in the action column for each row to delete. Do this in both the **Cost Change Reasons** and **Cost Change Reasons Translations** tabs.

Note: You cannot delete a reason code that is currently associated with a cost change. You will get an error if this occurs when the changes are uploaded.

As noted above, system-generated codes cannot be deleted.

Upload Changes

Once all updates have been made to the data in the spreadsheet, upload the spreadsheet to Merchandising:

1. Save the file and close it.
2. Return to the Merchandising screens.
3. Select **Foundation Data > Upload Foundation Data** from the main task list.
4. Select the **Price and Cost** template type.
5. Select the **Cost Change Reasons** template.

This automatically generates a process description. This can be updated, if desired.

6. Select and upload the file:
 1. Click the **Browse** button.
 2. Navigate to the directory where you saved the spreadsheet.
 3. Select the file.
 4. Click **Upload**.

The spreadsheet is uploaded and entered into Merchandising.

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 about uploading data through a spreadsheet, see “Data Upload” in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

Search for a Cost Change

To search for a cost change:

1. From the Task menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.
2. You can search for a cost change by 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 the basic mode.

Search for a Cost Change Through the Basic Search Criteria

To search for a cost change using basic search criteria:

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

Table 2–1 Cost Change Search - Basic Search Criteria and Description

Fields	Description
Match option	Check radio button All or Any. All - only suppliers matching all entered search criteria are shown. Any - suppliers matching any of the entered search criteria are shown.
Cost Change	Enter the cost change number.
Description	Enter the cost change description.
Status	Select the status of the cost change from the list.
Effective Date	Enter the effective date for the cost change, or use the Calendar icon to select a date.
Supplier Site	Enter, select or search for the supplier site.
Department	Enter, select or search for the department.
Class	Enter, select or search for the class.
Subclass	Enter, select or search for the subclass.
Item	Enter, select or search for the item.

2. Click on the Saved Search list to select one of the saved search criteria. Selecting a saved search populates the search section with the saved search criteria. If the run automatically function is enabled for the search, the search is executed immediately.

You can also personalize your saved searches by selecting **Personalize**. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see Personalize Saved Search in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

3. Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
4. Click **Reset** to clear the search section and results.
5. Click **Save As...** to save the current search criteria. The Create Saved Search page appears.

For more information about how to save your search criteria, see Create Saved Search in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

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

Search for a Cost Change Through Advanced Search Criteria

To search for a cost change 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 on the Saved Search list to select one of the saved search criteria. Selecting a saved search populates the search section with the saved search criteria. If the run automatically function is enabled for the search, the search is executed immediately.

You can also personalize your saved searches by selecting **Personalize**. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see Personalize Saved Search in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

4. Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
5. Click **Reset** to clear the search section and results.
6. Click **Save As...** to save the current search criteria. The Create Saved Search page appears.

For more information about how to save your search criteria, see Create Saved Search in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

7. 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.
8. Click **Reorder** to change the order of the available search fields. The Reorder Search Fields page 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 page.
 - Click **Cancel** to reject any changes and close the page.
9. Click **Done** to close the page.

Results

The Results section lists the retrieved cost changes.


Cost Change Search Toolbar

For information about the toolbar, see “Screen Level Action - Icons and Buttons” in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

Update a Cost Change

To edit a cost change event, follow the steps below.

1. From the Tasks menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
4. Select a cost change in the Results section.
5. Then select **Actions > Edit**, or use the Edit icon , or click on the cost change link. The Cost Change page appears.
6. Edit the information in the individual sections.

- a. Cost Changes by Item

- In the Items section, edit the new unit cost in the **Unit Cost New** column.

Note: If the cost change contains items with defined bracket costs, you can edit the new unit cost in the Bracket Details section, in the Unit Cost New column.

- Select the **Recalculate Order** checkbox to recalculate any outstanding purchase orders that have not been received.

For more information about the available sections of the Cost Change by Item page, see the [Cost Change by Item](#) section.

- b. Cost Change by Location

- In the Locations section, edit the new unit cost in the **Unit Cost New** column.

Note: If the cost change contains items with defined bracket costs, you can edit the new unit cost in the Bracket Details section, in the Unit Cost New column.

- Select the **Recalculate Order** checkbox to recalculate any outstanding purchase orders that have not been received.

For more information about the available sections of the Cost Change by Location page, see the [Create Cost Changes by Location](#) 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.

View a Cost Change

Approve a Cost Change


For a cost change to take affect, it needs to be in approved status. Depending on your user role, you may be able to move the cost change to the next status. A cost change may be in any of the following statuses:

Table 2–2 Cost Change Statuses

Status	Description
Worksheet	The cost change event is incomplete. You can edit, submit, or delete the cost change event.
Submitted	The cost change event is complete and submitted for approval. You can approve, reject, or delete the cost change event.
Approved	The cost change event is complete and has been approved. You can return the cost change event to Worksheet status for editing or cancel the cost change event.
Rejected	The cost change event is complete and has been approved. You can return the cost change event to Worksheet status for editing or cancel the cost change event.
Extracted	The details of the cost change event were extracted to the locations affected by the cost change event. Only cost change events in Approved status are extracted.
Cancelled	The cost event is deleted.

Submit a Cost Change for Approval


To submit a cost change for approval, follow the steps below.

1. From the Tasks menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.
2. Restrict the search to cost changes in Worksheet status.
3. Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
4. Select a cost change in the Results section.
5. Then select **Actions > Edit**, or use the Edit icon , or click on the cost change link. The Cost Change page appears.
6. Select the **Submit** button.
7. You are prompted to submit the cost change. Click **Yes** to confirm the prompt. The status of the cost change changes to Submitted.
8. 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.

Approve a Cost Change


To approve a cost change, follow the steps below.

1. From the Tasks menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.
2. Restrict the search to cost changes in Submitted status.
3. Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
4. Select a cost change in the Results section.

5. Then select **Actions > Edit**, or use the Edit icon , or click on the cost change link. The Cost Change page appears.
6. Select the **Approve** button.
7. You are prompted to approve the cost change. Click **Yes** to confirm the prompt. The status of the cost change changes to Approved.
8. 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.


Reject a Cost Change

To reject a cost change, follow the steps below.

1. From the Tasks menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.
2. Restrict the search to cost changes in Submitted status.
3. Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
4. Select a cost change in the Results section.
5. Then select **Actions > Edit**, or use the Edit icon , or click on the cost change link. The Cost Change page appears.
6. Select the **Reject** button.
7. You are prompted to reject the cost change. Click **Yes** to confirm the prompt. The status of the cost change changes to Rejected.
8. 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.

Cancel a Cost Change

To cancel a cost change, follow the steps below.

1. From the Tasks menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.
2. Restrict the search to cost changes in Approved status.
3. Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
4. Select a cost change in the Results section.
5. Then select **Actions > Edit**, or use the Edit icon , or click on the cost change link. The Cost Change page appears.
6. Select the **Cancel** button.
7. You are prompted to cancel the cost change. Click **Yes** to confirm the prompt. The status of the cost change changes to Cancelled.

8. 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.

Upload/Download Cost Changes from a Spreadsheet

Merchandising supports downloading of cost changes into a spreadsheet to allow you to carry out updates. The updated data can be re-uploaded into a staging area or uploaded into Merchandising. New cost changes can also be created through the upload flow. This section summarizes the workflow for both download and upload of cost change data.

For more information about loading cost change reasons, see “Download/Upload Data from Spreadsheets” in the *Merchandising Foundation Cloud Service Do the Basics User Guide*.

Download from Staging

You can download cost changes either from the staging area or from Merchandising. Typically cost changes are downloaded from the staging areas for purposes of workflow updates such as cost change approval or rejection. The data set to be downloaded can be selected using filter criteria that includes the effective and last update date ranges together with the user ID of the user who carried out the last update for easier workflow tracking. Alternately, you can also select all data that was part of an earlier upload or download request by selecting the process ID that uniquely identifies the request.

Cost Change Download from Staging

Search

Cost Change: Effective Date: -

Supplier Site: Created Date: -

Process: Last Updated By:

Cost Change Status: Worksheet

Search Reset Save...

Results

Actions View Download

Cost Change	Cost Change Description	Supplier Site	Process	Process Description	Effective Date	Created Date	Last Updated By
1	cc_upld	33	21741		7/5/16	7/1/16	RMS
131	181 Test		12185	Cost Change - 04/18/2016 00:52	9/8/16	4/18/16	RMS
135	181 Test	20101	12186	Cost Change - 04/18/2016 00:54	9/8/16	4/18/16	RMS
136	181 Test	20101	12301		9/8/16	4/21/16	RMS
181	181 Test	20101	13026	Cost Change - 04/25/2016 04:12	1/25/16	4/25/16	RMS
191	181 Test	20101	19221	Cost Change - 05/24/2016 03:16	1/25/16	5/24/16	RMS
192	181 Test		19229	Cost Change - 05/24/2016 03:30	1/29/16	5/24/16	RMS
789	Location Level Create and delete at the ...		19961	Cost Change - 05/30/2016 02:40	1/30/16	5/30/16	RMS
1890	Location Level Create and delete at the ...		19962	Cost Change - 05/30/2016 02:42	1/30/16	5/30/16	RMS
1980	Location Level Create and delete at the ...		19938	Cost Change - 05/30/2016 02:03	1/30/16	5/30/16	RMS

Done

Upload from Staging

Data currently available in the staging area can be uploaded into Merchandising. This is typically for cases wherein the cost change data might have been uploaded into the staging area for review and submission before the upload into Merchandising.

Cost Change Upload from Staging

Search

Cost Change: Effective Date: -

Supplier Site: Created Date: -

Process: Last Updated By:

Cost Change Status: Submitted

Search Reset Save...

Results

Actions View Upload

Cost Change	Cost Change Description	Supplier Site	Process	Process Description	Effective Date	Created Date	Last Updated By
20002	100200384	742682982	20350	Cost Change - 06/08/2016 02:56	12/28/15	6/8/16	RMS
30003	100900081 - loc		20350	Cost Change - 06/08/2016 02:56	1/5/16	6/8/16	RMS
45001	101150016 parent	742682982	20350	Cost Change - 06/08/2016 02:56	12/28/15	6/8/16	RMS
45003	101150059	742682982	20350	Cost Change - 06/08/2016 02:56	12/29/15	6/8/16	RMS
55001	101300037	742682982	20350	Cost Change - 06/08/2016 02:56	12/30/15	6/8/16	RMS
80002	102850049 - submit	742682982	20350	Cost Change - 06/08/2016 02:56	12/31/15	6/8/16	RMS

Done

Download from Merchandising

Similarly data can be downloaded from Merchandising. Cost change data is typically downloaded for purposes of updates such as effective date changes, workflow changes or reporting considerations.

Cost Change Download from RMS

Search

Cost Change: Effective Date: -
 Supplier Site: Created Date: -
 Cost Change Status: Submitted

Advanced Saved Search CostChangeInductionRMSVOCriteria

Search Reset Save...

Results

Actions View Download

Cost Change	Cost Change Description	Supplier Site	Effective Date	Created Date
20002	100200384	742682982	12/28/15	2/17/16
30003	100900081 - loc		1/5/16	2/17/16
45001	101150016 parent	742682982	12/28/15	2/18/16
45003	101150059	742682982	12/29/15	2/18/16
55001	101300037	742682982	12/30/15	2/18/16
80002	102850049 - submit	742682982	12/31/15	2/23/16
620003	107500558-c	5812373557	2/1/16	6/1/16

Done

In addition to downloading cost change data, you can also download blank templates, in a specified template format, that carry just the worksheets and column headers without any data. Such templates are generally used for creating new cost changes manually. Blank Templates can be downloaded from by navigating to **Foundation Data > Data Loading > Download Blank Template**. You need to select the Type as **Cost Change** and one of the Templates from the list available before opting to download the template. For more detail on using Blank Templates see "Download Blank Templates" in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

Upload from a File

Once updates have been carried out to downloaded data, you can upload the spreadsheet to have your updates applied in Merchandising or to update the staged cost change data.

Cost Change Upload from File

Source and Destination

Template: Cost Change Source: Choose File No file chosen
 Process Description: Cost Change - 10/03/2016 09:04 Destination:

Upload Done

View Issues

For downloads that occur in the background or uploads, you will receive a notification when the processing is complete. The notification will specify whether the process was executed successfully or not. Clicking on the link in the notification will take you to the Data Loading Status page in order to see the details. Alternatively, this page can be accessed by navigating to the **Data Loading > Review Status** option in the task list.

This task flow opens up the Data Loading status page, which lists the status of each upload/download request. Requests that were processed successfully will have their status set to Processed Successfully. Requests that were not processed successfully will have their status set to either Processed with Errors or Processed with Warnings. For such requests, you can access the View Issues page by clicking on the **View Issues** button to review details of the errors or warnings associated with a selected upload or download request.

Issues for Process 765001 | Cost Change - 03/28/2019 06:24

Cost Change	Supplier Site	Item	Country of Sourcing	Effective Date	Worksheet	Row	Column	Issue Type	Issue Description
					Cost_Changes	2	Reason	Error	Numeric or value error. Please check field length and...
					Cost_Changes	2	Active Date	Error	Invalid Date Format. Literal does not match format st...
					Cost_Change_Items	2	Cost Change Type	Error	Numeric or value error. Please check field length and...
					Cost_Change_Locations	2		Error	One or more of the following required fields are missi...
					Cost_Change_Locations	2	Cost Change Type	Error	Numeric or value error. Please check field length and...
					Cost_Change_Locations	2	Recalculate Order	Error	Numeric or value error. Please check field length and...
					Cost_Change_Locations	2	Location	Error	Numeric or value error. Please check field length and...

The details provided typically include the worksheet in which the error was encountered, the row and column in the spreadsheet that is in error, and the error description. Issues that are flagged as errors will need to be fixed in order to successfully create or update the cost change in Merchandising. Issues that are warnings can be ignored, but may also require updates to data depending on the warning.

Errors in download processing are typically due to the inability to access the data or insufficient privileges to create and write to the specified location. These errors can be resolved by removing any constraints that might have placed a lock on the data or ensuring that any constraints on creation of the spreadsheet are relaxed.

Errors in upload request processing are typically data-related and likely require data correction. You can use the error details in the View Issues screen as a guide to make corrections to the originally uploaded spreadsheet or download a new version through the Data Loading Status screen. If using this method, a worksheet containing a list of errors associated with the data set will be included as a separate tab in the downloaded spreadsheet to serve as an offline reference for carrying out the corrections. Once the errors have been corrected, the data can be re-uploaded into the staging area or Merchandising as needed, using the corrected file.

Deals Overview

This chapter helps you in understanding Deals supported within Merchandising.

A deal is a set of one or more agreements that take place between the retailer and a vendor. A vendor can be a supplier, wholesaler, distributor or manufacturer, and from the vendor, the retailer is entitled to receive discounts or rebates for goods that are either purchased or sold. A deal consists of a set of discounts and/or rebates that are negotiated with the vendor and share a common start date.

Deals can cover a specified period of time. For example, a special deal might be set up based on a promotion or have an open-ended timeframe (such as when a retailer might get 5% off on all merchandise ordered from a specific supplier).

After a deal has been successfully negotiated, it needs to be defined within Merchandising in order to have discounts on purchase orders applied or in order to recover rebates from the supplier. This deal definition is carried out in terms of its components, which include the following: item/locations, thresholds, discounts and funding percentages. Once this setup is complete, the deal can be approved.

Types of Deals

The different types of deals supported within Merchandising are as follows:

- **Off-invoice deals:** This type of a deal is set up between a retailer and a vendor where the retailer is provided a discount on purchase orders raised with the vendor when certain threshold criteria are met by the purchase order. The discount amount gets directly deducted from the cost of the item present in the order, and the retailer is required to pay only the discounted cost. Off-invoice deals are applied when purchase orders with the items on a deal are approved. If a manual cost is entered for the item on the purchase order, deals are not applied to the item unless you request an override of manual costs. Deals that cause the unit cost of an item to be below zero are not applied.
- **Bill Back (BB) deals:** This type of a deal is based on an agreement with a supplier or partner over a fixed or variable duration and has one or more components comprising of merchandise items, locations, thresholds and discounts. The deal definition captures the different thresholds that are set up for the items/locations present in the deal and the related discounts that the retailer is eligible to receive on successfully meeting the thresholds. The thresholds can be based on either purchases or receipts. A regular bill back compares each purchase event against the threshold individually, whereas receipts are compared in the aggregated form. All purchases-based bill back deals will generate income on the net cost of the purchase order, after the off-invoice deals have been applied.

- **Rebates:** Bill back rebate (BBR) deals are similar to the bill back deals described above, but these aggregate all the events and compare them against the thresholds in the aggregated form. Furthermore, bill back rebate thresholds can be based on sales in addition to purchases or receipts.
- **PO Specific Deals:** In addition to annual and promotional deals, a supplier might also offer certain deals which are specific to a purchase order. This type of a PO Specific Deal can be set up within Merchandising using an option that is available in the PO item setup screen. For such a deal, the Deal Timing gets populated with PO Specific, and the order number gets auto-populated. Only a single PO specific deal can be attached to a purchase order, and this will always be applied last in the sequence when calculating the deal totals.
- **Fixed Deals:** Fixed deals allow you to capture one-off payments or a series of payments from a vendor to the retailer. This type of deal caters to certain business setups that require the vendor to give the buyer a fixed amount of money in return for advertising their products for promotional reasons, for in-store demonstrations, or for displaying their merchandise in prime shelf space. A fixed deal comes with a defined amount, duration, billing frequency, and invoicing method. There is built-in logic to auto-generate billing requests for such amounts based on the billing frequency.

This chapter outlines the processes involved in setting up and maintaining all of the above types of deals.

This chapter includes the following topics to help you understand and manage deals:

- [Create a Deal](#)
- [Manage Deals](#)
- [Create a Fixed Deal](#)
- [Manage Fixed Deals](#)

Create a Deal

The Create Deal pop-up allows you to create and maintain deals with partners or suppliers. Deal partners can be wholesalers, distributors, and manufactures. Within a deal, you create deal components, specify the items and location for each deal component, and define thresholds.

Components are deals or parts of that deal you receive from a supplier. Multiple components can exist in a single deal. After you add the components, you define thresholds to define the quantity or amount that must be purchased or sold to receive the deal.

Finally, you define the items and locations where the deal can be applied. You can choose to include or exclude locations as necessary.

Additionally, you can define the proof of performance (POP) terms and expected deal income. You can define deal income only for bill back and rebate deals. POP terms are defined by the deal vendor that offers the deal. For deals, POP terms can be defined at the deal, deal/component, or deal component/item loc combination. For fixed deals, the POP terms are defined at the deal level.

To create a deal:

1. From the Tasks menu, select **Orders > Deals > Create Deal**. The Create Deal pop-up appears.

Figure 4–1 Create Deal Pop-up

2. The deal number is displayed by default.
3. In the **Vendor** field, select the vendor type, enter, select or search for the deal vendor.
4. In the **Currency** field, enter, select or search for the currency.
5. In the **Timing** field, select the timing of deal:
 - **Annual:** A yearlong deal you have with a deal partner. Only one annual deal can be applied to an item at a time. You close the deal manually when it expires, or the deal is closed automatically when you create another annual deal with the deal partner. On selection of Annual, the Billing Type gets defaulted to Off-invoice, and the field is disabled since this is the only possible type of annual deal.
 - **Promotional:** A deal that is generally shorter than an annual deal. Multiple promotional deals can be applied to an item at the same time. The deal closes automatically on the specified end date. Bill Back, Vendor Funded Promotion, Vendor Funded Markdown, and Off-invoice can all be promotional deals.
6. In the Active Date field, enter the date on which the deal becomes active, or click the calendar icon and select the date.
7. In the Close Date field, enter the date on which the deal ends, or click the calendar icon and select the date.


Note: This field is not required for annual deals.

8. In the Billing Type field, select the type of deal being created.

Note: If you select Annual in the Deal Timing field, Off-Invoice is the default for the Billing Type and cannot be changed.

- **Off-Invoice:** The deal is reflected as an amount decremented from the cost on the invoice.
- **Bill Back:** The deal income amount is invoiced to the supplier after the goods are purchased. A special type of a bill back is a rebate, which can be calculated on sales, purchase orders or receipts.

9. In the **Threshold Limit Type** field, select the type of threshold limit type. Certain deal types such as Off-invoice and Bill Backs allow the tracking of the threshold limit in terms of units or an amount.
10. In the **Threshold Limit UOM** field, select the UOM. If units are selected as Threshold Limit Type, you also need to define the Unit of Measure (UOM) that the threshold tracks. It will be disabled otherwise. For PO specific deals, if the Transaction Level Discount is set to Y, the threshold limit type is always Amount.
11. Select the **Recalculate Approved Orders** check box. This is only applicable to an Off-invoice deal. This indicates whether approved orders should be recalculated based on the current deal parameters and applies only in case of an off invoice deal. If this is checked, any approved order currently in the system that meets the deal criteria is recalculated based on the new deal once it is approved.
12. Select the **Security** check box. This indicator is used to implement user based security for the deal that is currently being created. In case this has been set for a deal, the deal details can be viewed or edited only by users who have the same or higher privileges compared to the deal creator.
13. In the **Ref. No.** field, enter a number.
14. In the **Comments** field, enter any additional comments as necessary.
15. Click **OK** to save any changes. The Deal page appears.
16. Click **Cancel** to return to the Tasks menu without saving changes.

Note: You can also create a deal by clicking **Create** in Actions menu, or by clicking the Create icon  on the Deal Search page.

Add Deal Header Information

The Deal Header includes the following fields.

Table 4–1 Deal Header - Fields and Description

Fields	Description
Title	<p>The title displays Deal ID and Billing Type with a separator between them to the top left of the head container. The Deal Timing and Deal Status is displayed with a separator between them to the top right of the head container.</p> <p>The possible values for billing type are Off invoice, Bill Back, or Bill Back Rebate.</p> <p>The deal number is populated by default.</p> <p>The possible values for deal timing are Promotional, Annual, PO specific deals.</p>
Deal Status	The description of the deal status, is displayed as text. If you create a deal the status is Worksheet. For more information on deal status, see the Change the Status of a Deal section.
Vendor	This field displays the type of vendor, vendor ID, and name.
Currency	This field displays the deal currency.
Threshold Limit Type	This field displays the threshold limit type.
Threshold Limit UOM	This field displays the threshold limit UOM.

Table 4–1 (Cont.) Deal Header - Fields and Description

Fields	Description
Recalculate Approved Orders	This field displays as Yes, if the Recalculate Approved Orders check box is checked in the Create Deal pop-up. This field will display as No, if the Recalculate Approved Orders check box is unchecked in the Create Deal pop-up.
Active Date	This field displays the date on which the deal becomes effective.
Close Date	This field displays the date on which the deal ends.
Security	This field displays if the deal was created with user security.
Ref. No.	Enter the deal reference number.
Order No.	This field displays the order number in case of PO specific deals.
Deal Created in RPM	This field is displayed if the deal was created in Price Management.

Note: The **Active Date**, **Close Date**, **Security**, and **Ref. No.** fields are editable. However, the remaining fields are displayed based on the information entered in the Create Deal pop-up.

Add Bill Back and Financials Details

The Bill Back and Financials section gets displayed for Bill Back (BB), and Bill Back Rebate (BBR) type deals.

The Bill Back and Financials section includes the following fields.

Table 4–2 Bill Back and Financials - Fields and Description

Fields	Description
Deal Reporting Level	The deal reporting level determines the length of the reporting periods that would be created for income generation. The options provided to you depends on the calendar type that is being used in the Merchandising instance. For a 4-5-4 calendar, this can be Week, Month, or Quarter, while for a Gregorian calendar, only Month or Quarter can be selected. Income is calculated once per reporting period. The reporting level also indicates the maximum frequency at which an invoice is raised against the income accrued by the deal.
Purchase/Sales Based	Select whether the deal will be based on purchase or sales. Bill Back Deals are always based on purchases, while Bill Back Rebate deals can be based on either purchases or sales.
Deal Application Timing	Select the deal application timing. The options for Deal Application Timing depends on whether the deal is purchase or sales based. Purchase-based deals can have this set to the PO approval or receiving timing. Sales-based deals do not have timing specified since they are driven by sales records and are applied only when a sale occurs.
Add Deal Reporting Days	This field is used to capture the number of extra reporting days that should be added to the deal actual forecast data to cater to the late postings of the transactions after the deal close date.

Table 4–2 (Cont.) Bill Back and Financials - Fields and Description

Fields	Description
Pack Level Tracking	For receipt-based Bill Back and receipt or sales-based Bill Back Rebate deals, the indicator for tracking the deal at the pack level is enabled. Select this indicator to generate income for purchase orders which involve receiving at the pack level or sales occurring at the pack level. This is enabled only for receipt based bill back and receipt or sales based bill back rebate deals.
Rebates sub section:	
Rebate Calculation Type	Select the rebate calculation type from the list. This field determines the method in which the comparison of thresholds is performed against the actual turnover figures. Here the term turnover refers to the total revenue generated for a period across the merchandise hierarchy for which the deal is applicable. This is defaulted to Linear and disabled for a BB deal, while for a BBR, you can set it to Linear or Scalar.
Growth Rebate	A rebate in which the supplier determines the amount of the rebate, based on increased orders over a specified period of time. The Growth Rebate information is available only for Bill Back Rebate deals and is for informational and reporting purposes. Selecting this indicator enables the Historical Period fields and allows a buyer to set up a growth rebate deal by looking up prior receipt or sales values in the data warehouse system. The growth percentage can then be manually applied to these values to come up with thresholds that would be applicable for the current deal.
Historical Period Start Date	The start and end dates of the historical period against which growth will be measured for this growth rebate.
End Date	
Financials sub section:	
Bill Back Period	Select the period for how frequently the vendor is billed. This period needs to be at least as large as the reporting period because income calculation is performed only at the end of a reporting period. For the 4-5-4 calendar, the choices for the invoice periods are: Week, Month, Quarter, Half Year or Annual. The same choices apply for Gregorian calendar, except Week. This field remains editable until the first invoice has been raised against the deal.
Billing Vendor	This field indicates the vendor to be billed for the specific deal, which can be different from the vendor specified for the deal in Deal Head. Select the vendor type and enter, select or search for the vendor.
Estimated Next Invoice Date	The estimated date the next invoice is going to be sent to the vendor. Enter the correct date or click the calendar icon and select the correct date. The effective date for raising the invoice will depend on when the financial month is closed. The estimated next invoice date gets populated initially based on the bill back period. It takes the last day of the period that will be invoiced. After the invoicing batch program Vendor Deal Invoicing (vendinv) runs, this date is updated with a Gregorian week, month, or quarter, or the 4-5-4 week setup based on the calendar configuration in the system. This date can be modified throughout the deal’s lifetime, even after approval until the last invoice against the deal has been processed.

Table 4–2 (Cont.) Bill Back and Financials - Fields and Description

Fields	Description
Last Invoice Date	This field is updated to hold the last reporting period that was invoiced. Enter the date or click the calendar icon and select the date.
Bill Back Method	This indicates whether invoices raised for this deal are in the form of a credit note or a debit note. The option selected here overwrites the supplier's default setup in Invoice Matching. This field remains editable until the last invoice against the deal has been processed.
Deal Income Calculation	The basis for calculating the amount earned from the deal. Actual will only generate income on real turnover. Pro-rated calculates income based on forecasts and actual turnover and distributing this income over all open periods. For BB and BBR types of deals, you have the option of calculating the deal income based on the actual values earned until the current date, or of using the method of proration on the forecasted amount.
Invoice Processing Logic	Select the method for how invoices will be raised for this deal. You have the following options available in the case of BB and BBR type of deals - Automatic all values, manual all values, automatic positive values, manual positive values only, no invoice processing. This field remains editable until the first invoice has been raised against the deal.
Deal Income in Stock Ledger	Select the check box to indicate that deal income accrual should be written to the stock ledger.
Include VAT	Select the check box to indicate that VAT should be included in the invoice information.

Add a Component

On the Deal Components section, you can manage deal component information. Deal components are discounts or rebates included in the deal. When you enter deal component information, you determine the billing type, Threshold Value Type, Deal Class, Cost Apply type, and other parameters about how deal component is calculated. You can also specify that a deal component is a transaction level discount that applies to entire purchase orders rather than individual items.

The component type description can be added for deal component information as well as a defaulting contribution percentage.

Note: Merchandising is the custodian of the invoicing logic and will drive the invoicing functionality.

Add Deal Components

You can add deal components to a deal while creating or editing in the Deal page.

To add deal components:

1. From the Tasks menu, select **Orders > Deals > Create Deal**. The Create Deal pop-up appears.
2. Enter the relevant data and click **OK** to save the changes. The Deal page appears.
3. In the Deal page, go to the Components section.

Figure 4–2 Components Section

4. From the Actions menu, click **Add** or click the Add icon **+**. The Add Component pop-up appears.

Figure 4–3 Add Component Pop-up

5. In the **Type** field, select the component type.
6. In the **Threshold Value Type**, select the threshold value type. This field is used to capture the incentive type that would be received on attaining the threshold limit of the deal. The options are amount off per unit, percentage off per unit, get units for fixed price or buy/get free or discounted items.
7. For an off-invoice deal, in the **Deal Class** field, select the way in which calculations would be performed in case of multiple deal components. The options are Cumulative, Cascade, or Exclusive.

Note: For a Bill Back, Vendor Funded Promotion, and Vendor Funded Markdown this field will default to Cascade and cannot be changed.

8. In the **Cost Apply Type** field, select how the deal component is used to calculate future costs. The options are Net Cost, Net-Net Cost or Dead Net Cost. The details such as **Cost Apply Type** is defaulted to **Net Cost** and can be overridden.

Note: The value in this field is defaulted based on the type of deal you selected, but can be changed.

9. Select the following check boxes:

- **Transaction Level Discount** - This check box applies to PO-specific off-invoice deals. If this check box is selected on the screen, the deal component applies to an entire PO, receipt or sale transaction. This field can only be selected if the vendor is a supplier. Because these deals apply to the entire order, items and locations are not added to transaction level deals.
- **Calculate Income From Zero Threshold** - This check box is not applicable for off-invoice deals. This indicator is used in cases where the vendor has specified that a minimum threshold needs to be reached before a discount applies and when that threshold is reached, the discount applies against the entire threshold, including the level below the threshold.
- **Deal in Price Cost** - This indicator defines whether the deal is to be used in the pricing cost calculation used by Price Management to determine the margin on the items linked with the deal.

10. In the **Comments** field, enter any additional comments as necessary.

11. Then choose one of the following options.

- Click **OK** to add the deal component.
- Click **OK and Add Another** to add more deal components.
- Click **Cancel** to return to the Deal Page.

Promotions

The Promotions pop-up allows you to view a component of a deal with promotions. You can attach multiple promotions to a deal component. The promotion is set up in the pricing system and can then be attached to the deal component.

Deal Component Types

Deal component types are a required component of using the Deals functionality in Merchandising. All deals must have at least one component, and the types are a configurable way for retailers to classify the components added to a deal. New component types can be added as desired by implementation to configure the solution to meet your company's needs. The list of valid deal component types are defined by a configurable list of codes and descriptions, which are managed through spreadsheet download and upload processes. These processes are accessed through the main Merchandising task list under **Foundation Data > Download Foundation Data** and **Foundation Data > Upload Foundation Data**.

1. Select the **Price and Cost** template type from the Download Data screen.
2. Select the Deal Component Types template.
3. Click the Download button.
4. When prompted do one of the following:
 - Open the .ods file.
 - Save the file, then open it in the spreadsheet application of your choice.

Once opened, there are two sheets that can be modified:

- **Deal Component Types** - This is where new types can be created, and existing types can be updated or deleted.
- **Deal Component Type TL** - This is where translated values can be created, updated, or deleted.

Add a Deal Component Type To add a new deal component type:

1. Open the **Deal Component Types** tab.
2. Select the **Create** action type in a blank line.
3. Enter the **Description** for the component type in the primary language (up to 250 characters).

Note: The primary language is defined in the Merchandising system options.

4. Enter a unique code for the deal component type (up to 2 digits).
5. If necessary, add descriptions in other languages:
 1. Select the **Deal Component Type TL** tab.
 2. Select the **Create** action type in a blank line.
 3. Enter the language for the translated description.
 4. Enter the code for the new deal component type.
 5. Enter the translated description (up to 250 characters).

Update a Deal Component Type If you would like to update any details for existing deal component types, a similar process will be followed as that described above for creating new deal component types. First, download the spreadsheet, and then navigate to the tab where you would like to make your updates.

The following columns can be updated in each tab:

- **Deal Component Types** - Description
- **Deal Component Type TL** - Description

To update a reason:

1. Select the **Update** action type in the row to update.
2. Enter the correct description.

Delete a Deal Component Type To delete a deal component type that is no longer used by your business, select **Delete** in the action column for each row to delete. Do this in both the **Deal Component Types** and **Deal Component Type TL** tabs.

Note: You cannot delete a deal component type that is currently associated with a deal. You will get an error if this occurs when the changes are uploaded.

Upload Changes Once all updates have been made to the data in the spreadsheet, upload the spreadsheet to Merchandising:

1. Save the file and close it.

2. Return to the Merchandising screens.
3. Select **Foundation Data > Upload Foundation Data** from the main task list.
4. Select the **Price and Cost** template type.
5. Select the **Deal Component Types** template.

This automatically generates a process description. This can be updated, if desired.

6. Select and upload the file:
 1. Click the **Browse** button.
 2. Navigate to the directory where you saved the spreadsheet.
 3. Select the file.
 4. Click **Upload**.

The spreadsheet is uploaded and entered into Merchandising.

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 about uploading data through a spreadsheet, see “Data Upload” in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

Add Buy/Get Details

The Buy/Get Item pop-up is only enabled, if Threshold Value Type selected is Buy/Get free or discounted items for off-invoice deals.

Add Buy/Get Item To add buy/get item:

1. Click **Buy/Get Item** from the Components section. The Buy/Get Item pop-up appears.

Figure 4–4 Buy/Get Item Pop-up

The screenshot shows a 'Buy/Get Item' pop-up window. It is organized into three distinct sections. The top section, labeled 'Buy', contains a single 'Item' input field. The middle section, labeled 'Threshold Target Quantities', includes 'Item', 'Purchase Order', and 'Location' input fields, along with a 'Recurring for All Buy Quantity' checkbox. The bottom section, labeled 'Get', features a 'Type' dropdown menu, an 'Item' input field, a 'Unit Cost' input field with a 'USD' currency indicator, a 'Discount' input field, and a 'Discount Apportion %' input field. Navigation arrows are visible on the right side of the form, and 'OK' and 'Cancel' buttons are located at the bottom right.

2. The Buy/Get Item pop-up consists of the following three sections:

- **Buy**

- In the **Item** field, enter or search an item using the search icon. It identifies the item that must be purchased for a quantity threshold-type discount.

- **Threshold Target Quantities**


- In the **Item** field, enter an item threshold target quantity for the buy item that must be ordered to qualify for the free item.
- In the **Purchase Order** field, enter the threshold target quantity for all locations on the purchase order which the buy item is part of. This is the target level that will be used for future calculation of net cost.
- In the **Location** field, enter threshold target quantity which is the average targeted purchase level per location on the deal. This value will be used in future cost calculations.
- Select the **Recurring for All Buy Quantity** check box. This indicates if the quantity threshold discount is only for the first buy amount purchased (example, for the first ten purchased, get one free), or if a free item will be given for every multiple of the buy amount purchased on the order (example, for every ten purchased, get one free).

- **Get**


- In the **Type** field, select the Get type from the list. Valid options are free, percent, amount or fixed amount.
- In the **Item** field, enter or search for an item using the search icon. This identifies the get item for a quantity threshold-type (buy/get) discount.

- In the **Unit Cost** field, enter the amount. This will be enabled if the Get type selected is Free and identifies the unit cost of the threshold free item that will be used in calculating the prorated quantity discount. It will default to the item/supplier cost, but can be modified based on the agreement with the supplier.
 - In the **Discount** field, enter a value. This will be enabled in case Get type is not 'Free'. It will be percent in case get type is Percent otherwise value.
 - In the **Discount Apportion %** field, enter a value. This specifies the percentage of the total discount that should be apportioned from the get items unit cost for off invoice deals where buy item is not the same as the get item and Get type is Free. The remaining will be apportioned from the buy item unit cost.
 - In the **Threshold Quantity** field, enter a value. This identifies the quantity of the identified get item that will be given at the specified get discount if the buy amount of the buy item is purchased.
3. Click **OK** to add the buy/get item information.
 4. Click **Cancel** to return to the Deal page.

Edit a Deal Component To edit a deal component:

1. Select the deal component you want to edit.
 2. From the Actions menu, click **Edit** or click the Edit icon .
- The Edit Component pop-up appears.
3. Edit the enabled fields as necessary.
 4. Click **OK** to return to Deal page.
 5. Click **Save** or **Save and Close** to save the changes.

Delete a Deal Component To delete a component:

1. Select the deal component you want to delete.
 2. From the Actions menu, click **Delete** or click the Delete icon .
- You are prompted to delete the deal component.
3. Click **Yes** to confirm deletion.
 4. Click **Save** or **Save and Close** to save the changes.

Add Items and Locations

On the Item/Locations section, you can select the items to which the deal components are applied. You can also specify specific locations for the items. Items and items at specific locations can also be excluded from deal component.

The item/location information is set up per component.

Item/Locations - View Menu and Icons

You can customize the view of the table by using the options in the View Menu. For information about this menu, see below and see “View Menu” in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

Figure 4–5 Item/Locations - View Menu

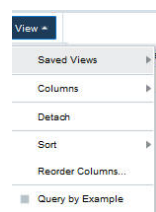


Table 4–3 Item/Locations - View Menu/Icons and Description

View Menu List	Description
Saved Views	Saved views are predefined arrangement of table columns to provide certain specific information by using default and optional columns and is different from the default view. The views available are Merchandise Hierarchy, Organization Hierarchy, and Item Level. For every record you can choose respective saved view to see information related to merchandise hierarchy, organization hierarchy, or item level.

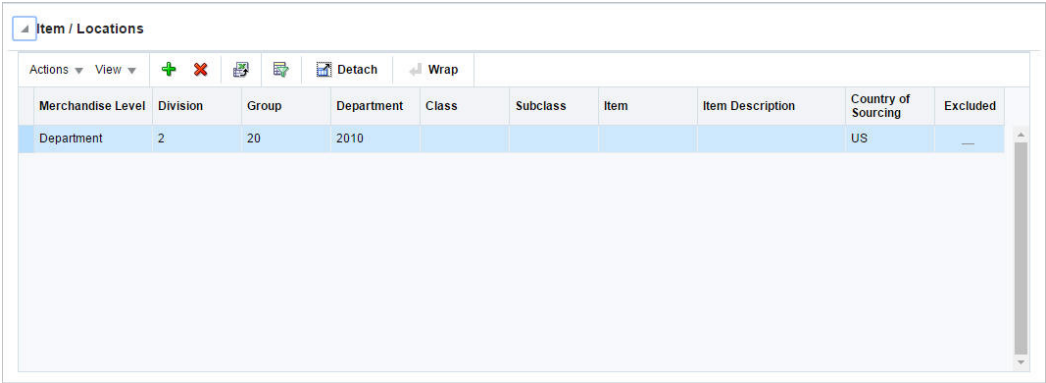
Add the Item/Locations to a Deal

You can add item/locations to a deal component while creating or editing in the Deal page.

To add the item/locations of a deal:

- 1. From the Tasks menu, select **Orders > Deals > Create Deal**. The Create Deal pop-up appears.
- 2. Enter the relevant data and click **OK** to save the changes. The Deal page appears.
- 3. In the Deal page, go to Item/Locations section.

Figure 4–6 Item/Locations Section




- 4. From the Actions menu, click **Add** or click the Add icon **+**. The Include/Exclude Item/Location pop-up appears

Figure 4–7 Include/Exclude Item/Location Pop-up

5. Select the include or exclude option to determine if the record is being created for inclusion or exclusion.
6. In the Item section, select the merchandise level from the Merchandise Level list. Choose the appropriate option to add an item by Item or Item List.
7. In the Location section, select the organizational level from the Organizational Level list. Choose the appropriate option to add location by Store, Warehouse, or by Location List.
8. Then choose one of the following options.
 - Click **OK** to add the item/location.
 - Click **OK and Add Another** to add more item/locations.
 - Click **Cancel** to return to the Deal Page.

Delete an Item/Location

To delete an item/location:

1. Select the item/location you want to delete.
2. From the Actions menu, click **Delete** or click the Delete icon .
- You are prompted to delete the deal component.
3. Click **Yes** to confirm deletion.
4. Click **Cancel** to retain the record.

Add Thresholds and Discounts

On the Thresholds section, you can specify the lower and upper limits that need to be reached in order to receive the benefits that are defined as part of the current deal. Multiple thresholds or bands can be defined for a deal.

If the threshold value type that was defined for the deal component is set to Amount Off, you have the option to select whether the specified amount needs to be applied per unit or as a total value for the entire threshold band. For example, a vendor might offer the retailer a discount of \$1 per unit or a total discount of \$50 on buying in excess of 100 quantities.

Each component added to the deal can be used as the target level around which cost calculations need to take place. You must indicate the threshold band that is to be treated as the targeted level for a deal component. This threshold band is then used for the future cost and pricing cost calculations.

Add the Thresholds of a Deal

You can add thresholds to a deal component while creating or editing in the Deal page. To add the thresholds of a deal:

- 1. From the Tasks menu, select **Orders > Deals > Create Deal**. The Create Deal pop-up appears.
- 2. Enter the relevant data and click **OK** to save the changes. The Deal page appears.
- 3. In the Deal page, go to Thresholds section.

Figure 4–8 Thresholds Section

Thresholds Currency USD

Actions View Detach Wrap Revisions

Lower Limit	Upper Limit	Value	Total / Unit	Target Level	Amendment Comments
0	1,000	10.00	Unit	—	
1,001	10,000	15.00	Unit	✓	

- 4. From the Actions menu, click **Add** or click the Add icon . The Add Threshold pop-up appears.

Figure 4–9 Add Threshold Pop-up

Add Threshold

* Lower Limit

* Upper Limit

* Value

Total / Unit

Target Level ☐

OK

OK and Add Another


Cancel

- 5. In the **Lower Limit** field, enter the value of the lower limit of the deal component. This is the minimum value that must be met in order to get the specified discount. This value will be either a currency amount or quantity value, depending on the threshold limit type of this deal component.

6. In the **Upper Limit** field, enter the value of the upper limit of the deal component. This is the maximum value for which the specified discount will apply. This value will be either a currency amount or quantity value, depending on the threshold limit type of this deal component.
7. In the **Value** field, enter the value of the discount that will be given for meeting the specified thresholds for this deal component. This value will be either a currency amount or quantity value, depending on the threshold limit type of this deal component.
8. In the **Total/Unit** field, select the total or unit. It indicates if the value for deal components for which the threshold type is amount off is amount off by unit or in total.
9. Select the Target Level check box. This indicates if a threshold level is the targeted purchase or sales level for a deal component. This indicator will be used for cost calculations.
10. Click **OK** to add thresholds. You can add more thresholds by clicking **OK and Add Another**.
11. Click **Cancel** to return to the Thresholds section.


Edit the Threshold of a Deal

To edit the threshold of a deal:

1. Select the threshold you want to edit.
2. From the Actions menu, click **Edit** or click the Edit icon .
- The Edit Threshold pop-up appears.
3. Edit the enabled fields as necessary.
4. Click **OK** to return to Deal page.
5. Click **Save** or **Save and Close** to save the changes.

Delete the Threshold


To delete the threshold:

1. Select the threshold you want to delete.
2. From the Actions menu, click **Delete** or click the Delete icon .
- You are prompted to delete the record.
3. Click **Yes** to confirm deletion.
4. Click **Save** or **Save and Close** to save the changes.

Create a Purchase Order-specific Deal

You can also create PO specific deals. To create a PO-Specific Deal, follow the steps listed below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.

4. In the Order column, click the order link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Order page appears.
5. In the Orders toolbar, click **Details**. The Order Details page appears.
6. In the Order Details toolbar, select **More Actions > PO-Specific Deal**. The Create Deal pop-up appears.
For more information about the Create Deal pop-up, see the [Create a Deal](#) section.
7. In the **Threshold Limit Type** field, select how the threshold is defined.
8. Click **OK** to save any changes. The Deal page appears.

Manage Deals

You can access the option to manage deal from the Tasks menu. Managing deals involves performing one or more of the following tasks:

- Searching for a deal
- Creating a deal
- Creating from an existing deal
- Editing a deal
- Viewing a deal

On clicking the Manage Deal link by selecting **Orders > Deals > Manage Deal**, the Deal Search page appears.

In the Deal Search page you can search for deals by specifying various search criteria. You can choose to access deals in the search results in edit or view mode depending on security privileges. There are also options for creating a new deal or creating a new deal from existing.

The Deal Search page includes the following sections:

- Search

For more information on the Deal Search page, see the [Search for a Deal](#) section.

- [Results](#)
- [Deal Search Toolbar](#)

Figure 4–10 Deal Search Page

Deal Search

Search

Deal

Deal Type

Status Submitted

Billing Type

Vendor Type

Vendor

Active Date

Close Date

Advanced

Saved Search

Default

Search

Reset

Save...

Results

Actions

View

Detach

Deal	Vendor	Vendor Name	Status	Billing Type	Active Date	Close Date
745001	153	Bharti_Supplier	Submitted	Off-Invoice	8/2/16	
750001	153	Bharti_Supplier	Submitted	Off-Invoice	8/2/16	
765001	153	Bharti_Supplier	Submitted	Off-Invoice	2/23/16	
1135001	153	Bharti_Supplier	Submitted	Off-Invoice	5/10/16	10/31/18
1180001	153	Bharti_Supplier	Submitted	Off-Invoice	5/1/16	
1315009	5812481816	Fashion Retailer US Supplier	Submitted	Off-Invoice	5/16/16	5/17/16

?

Done

Search for a Deal

To search for a deal:

1. From the Tasks menu, select **Orders > Deals > Manage Deal**. The Deal Search page appears.
2. You can search for a deal by providing search criteria in the search section. The criteria can be provided either in Basic or Advanced mode, depending on the requirement. Basic is the default mode when the search page is entered. Click **Advanced** to access the search panel in advanced mode. You can return to Basic mode by clicking **Basic**.

Search for a Deal Through the Basic Search Criteria

To search for a deal through the basic search criteria:

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

Table 4–4 Deal Search - Basic Search Criteria

Fields	Description
Deal	Enter the deal ID.
Deal Type	Select the deal type. The options are: Annual, Promotional, PO Specific, Vendor Funded Markdown.
Status	Select the status of the deal. The options are: Worksheet, Submitted, Approved, Rejected, Closed.
Billing Type	Select the type of deal being created. The options are Off Invoice, Bill Back, Bill Back Rebate, Vendor Funded Promotion, Vendor Funded Markdown.
Vendor Type	Select the vendor type.

Table 4–4 (Cont.) Deal Search - Basic Search Criteria

Fields	Description
Vendor	Enter, select or search for the vendor.
Active Date	Enter the date on which the deal becomes active, or click the calendar icon and select the date.
Close Date	Enter the date on which the deal ends, or click the calendar icon and select the date.

2. You can also click the Saved Search drop down to select one of the saved sets of search criteria. Selecting a saved search will populate the criteria section with saved criteria. If the saved search is selected to run automatically then the search will be executed too.

You can also choose to manage and personalize the saved searches by clicking **Personalize** in the list. The Personalize Saved Searches page appears.

For more information on the Personalize Saved Searches, see Personalize Saved Search in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

3. Click **Search**. The deals that match the search criteria are displayed in the Results section.
4. Click **Search**. The deals that match the search criteria are displayed in the Results section.
5. Click **Reset** to execute the saved search.
6. Click **Save**. to save the current set of search criteria as a Saved Search. The Create Saved Search pop-up appears.

For information on the Create Saved Search pop-up, see Create Saved Search in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

7. Click **Done** to close the pop-up.

Search for a Deal Through the Advanced Search Criteria

To search for a deal through the advanced search criteria:

1. Enter or select one or all of the following advanced search criteria.

Table 4–5 Deals Search - Advanced Search Criteria

Fields	Description
Deal	Enter the deal ID.
Deal Type	Select the deal type. The options are: Annual, Promotional, PO Specific, Vendor Funded Markdown.
Status	Select the status of the deal. The options are: Worksheet, Submitted, Approved, Rejected, Closed.
Billing Type	Select the type of deal being created. The options are Off Invoice, Bill Back, Bill Back Rebate, Vendor Funded Promotion, Vendor Funded Markdown.
Vendor Type	Select the vendor type.
Vendor	Enter, select or search for the vendor.
Active Date	Enter the date on which the deal becomes active, or click the calendar icon and select the date.

Table 4–5 (Cont.) Deals Search - Advanced Search Criteria

Fields	Description
Close Date	Enter the date on which the deal ends, or click the Calendar icon and select the date.
External Ref. No.	Enter the external reference number.
Order No.	Enter, select or search for the order number.
Deal Component Type	Select the deal component type.
Rebate	Select Yes if the rebate is included in the deal or select No if the rebate is not included in the deal.
Promotion	Enter, select or search for the promotion from the list.
Division	Enter the division number, select or search for the division name and number.
Group	Enter the group number, select or search for the group name and number from the list.
Department	Enter the department number, select or search for the department name and number from the list.
Class	Enter the class number, select or search for the class name and number from the list.
Subclass	Enter the subclass number, select or search for the subclass name and number from the list.
Item	Enter the item number, or search by using the search icon.
Chain	Enter the chain number, select or search for the chain name and number from the list.
Area	Enter the area number, select or search for area name and number from the list.
Region	Enter the region number, select or search for the region name and number from the list.
District	Enter the district number, select or search for the district name and number from the list.
Location	Enter the location number, select or search for the location name and number from the list.

Figure 4–11 Search Section in Advanced Search Mode

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 on the Saved Search list to select one of the saved search criteria. Selecting a saved search populates the search section with the saved search criteria. If the run automatically function is enabled for the search, the search is executed immediately.

You can also personalize your saved searches by selecting **Personalize**. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see Personalize Saved Search in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

4. Click **Search**. The deals that match the search criteria are displayed in the Results section.
5. Click **Reset** to clear the search section and results.
6. Click **Save As...** to save the current search criteria. The Create Saved Search pop-up appears.

For more information about how to save your search criteria, see Create Saved Search in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

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

Results


The Results section lists the retrieved deals.

Deal Search Toolbar

For information about the toolbar, see “Screen Level Action - Icons and Buttons” in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

Edit a Deal

To edit a deal, follow the steps below.

1. From the Tasks menu, select **Orders > Deals > Manage Deal**. The Deal Search page appears.
2. Select the deal you want to edit.
3. Select **Actions > Edit**, or click the Edit icon . The Deal page appears in Edit mode.
4. Make the necessary changes and click **Done** to save the changes.


View a Deal

To view a deal, follow the steps below.

1. From the Tasks menu, select **Orders > Deals > Manage Deal**. The Deal Search page appears.
2. Enter additional criteria as desired to make the search more restrictive.
3. Select the deal you want to view.
4. Click **Done** to close the page.

Create a Deal

To create a deal, follow the steps below.

1. From the Tasks menu, select **Orders > Deals > Manage Deal**. The Deal Search page appears.
2. From the Actions menu, select **Create** or click the Create icon . The Create Deal page appears.

For more information on how to create a deal, see the [Create a Deal](#) section

Deal Toolbar

For information about the toolbar, see “Screen Level Action - Icons and Buttons” in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

Deal - More Actions Menu

Use the More Actions menu to navigate to the following pages. The More Actions menu contains the following options.

Figure 4–12 Deal - More Actions Menu

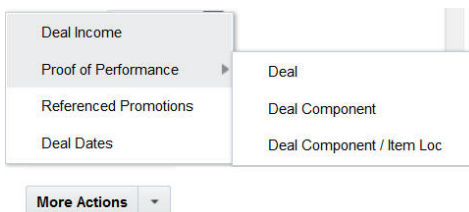


Table 4–6 Deal - More Actions Menu and Description

Action Buttons	Description
More Actions	<p>You can navigate to open the following pop-ups by clicking More Actions menu:</p> <p>You can navigate to the following pop-ups from the More Actions menu:</p> <ul style="list-style-type: none"> ■ Deal Income <p>By clicking the Deal Income, the Deal Performance appears.</p> ■ Proof of Performance <p>You can access the Proof of Performance pop-up at the following levels:</p> <ul style="list-style-type: none"> ■ Deal ■ Deal Component ■ Deal Component /Item Loc ■ Manage Referenced Promotions ■ View Deal Dates

Approve a Deal

Change the Status of a Deal

When a deal is added to the system, it must go through a series of checks before it is accessible in the system. Depending on your user role, you may not be able to move the deal to the next status. A deal may be in any of the following statuses:

Table 4–7 Deals Approval Process Status

Status	Definition
Worksheet	The deal has been started, but not completed.
Submitted	The deal has been completed and is pending review.
Approved	The deal has been reviewed and has been approved.
Rejected	The deal has been submitted, reviewed, and has been rejected.
Closed	The deal is complete.

Submit a Deal

You can submit a deal when a deal is created and the deal is in Worksheet status.

To submit a deal:

1. From the Tasks menu, select **Orders > Deals > Create Deal**. The Create Deal pop-up appears.
2. Click **OK** to save any changes. The Deal page appears.
3. In the Components section, select **Actions > Add** or click the Add icon **+**.
The Add Component pop-up appears.

Note: You need to enter the required information in the following sections before submitting a deal:

- Components
 - Item/Locations
 - Thresholds
-
-

4. Enter all the required information and click **Submit** on the page level toolbar. The deal status changes to **Submitted**.
5. Click **Save** to save your changes or click **Save and Close** to save and close the page.
6. Click **Cancel** to discard the changes and close the Deal page.

Approve a Deal

The status of a deal changes as it passes through an approval process. Depending on your user role, you can change the status of a deal. The status can be Worksheet, Submitted, Approved, Rejected, or Closed. A deal is not effective until it is approved.

To approve a deal:

1. From the Tasks menu, select **Orders > Deals > Create Deal**. The Create Deal pop-up appears.
2. Click **OK** to save any changes. The Deal page appears.
3. In the Components section, select **Actions > Add** or click the Add icon **+**. The Add Component pop-up appears.

Note: You need to enter the required information in the following sections before submitting a deal:

- Components
 - Item/Locations
 - Thresholds
-
-


4. Enter all the required information and click **Submit** on the pop-up level toolbar. The deal status changes to **Submitted**.
5. Click **Approve**. The status changes to **Approved**.
6. Click **Save** to save your changes or click **Save and Close** to save and close the pop-up.
7. Click **Cancel** to discard the changes and close the Deal page.

Reject a Deal

To reject a deal:

1. From the Tasks menu, select **Orders > Deals > Manage Deal**. The Deal Search page appears.
2. In the Status field, select the deal in Submitted status and click **Search**.

The deals that are in Submitted status are displayed in a table in the Results section.

3. Select the deal that you wish to reject.
4. Select **Actions > Edit** or click the Edit icon . The Deal page appears.
5. Click **Reject**. The status changes to **Reject**.
6. Click **Save** to save your changes or click **Save and Close** to save and close the page.
7. Click **Cancel** to return to the Deal Search page.

Close a Deal

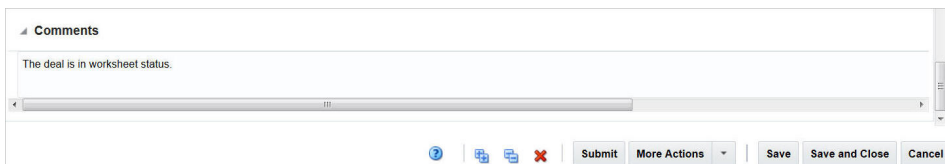
It is necessary to close any active deal which is present in the system on or after its close date. A daily batch scrutinizes all deals that are currently active and closes the deals that match this criteria. The closed deals would still be available within the application for audit purposes, but will not be applied to any matching transaction or processed by any batch programs for income generation.

Add Comments to a Deal

To add comments to a deal:

1. In the Comments section, enter your comments.

Figure 4–13 Comments Section



2. Click **Save** to save your changes or click **Save and Close** to save and close the page.
3. Click **Cancel** to discard the changes and close the page.

Deal Performance

The Deal Performance page allows you to maintain forecasts for a deal, view period by period performance, and compare the actual deal performance against the actual forecasts.

As actuals are accrued, you can view the actual performance of the deal, at the component level, against the forecasted performance of the deal.

View Deal Performance Page

To view deal performance:

1. From the Tasks menu, select **Orders > Deals > Create Deal**. The Create Deal page appears.
2. Enter the relevant data and click **OK** to save the changes.
The Deal page appears.

3. From the More Actions menu, click **Deal Income**.

The Deal Performance page appears, which includes Total and Periods section. For more information on Total and Periods, see the [Totals](#) and the [Periods](#) section.

Figure 4–14 Deal Performance Page

Deal

Deal Performance

Deal 395001

Worksheet | USD

Vendor

3 | EIT Second Supplier

Activated Date

21-Mar-2017

Reporting Period

Week

Closed Date

28-Mar-2017

Billing Period

Week

Estimated Next Bill Date

25-Mar-2017

Turnover Measure

Quantity - number of Units

Total

Actions

View

Detach

Component	Description	Turnover				Income				Deal to Date			
		Baseline	Budget	Budget Fixed	Actuals / Forecast	Actuals / Forecast Fixed	Actuals / Trend	Budget	Actuals / Forecast	Actuals / Trend	Budget Growth %	Total Turnover	Actual Monies Earned
1	Vender Funded Promotion	0.000	0.000	<input type="checkbox"/>	0.000	<input type="checkbox"/>	0.000	0.000	0.000	0.000	0.000	0.000	0.000
		0.000	0.000		0.000		0.000	0.000	0.000	0.000	0.000	0.000	0.000

Periods

Actions

View

Detach

Copy Baseline Turnover to Budget

Period End	Turnover				Income			
	Baseline	Budget	Actuals / Forecast	Actuals / Trend	Budget	Actuals / Forecast	Actuals / Trend	Actuals

Save

Save and Close

Cancel

Deal Performance Header

The Deal Performance Header includes the following fields.

Table 4–8 Deal Header - Fields and Description

Fields	Description
Title	The title displays Deal ID to the top left of the head container. The Deal Status and the Currency is displayed with a separator between them to the top right of the head container. The deal number is populated by default.
Deal Status	The description of the deal status, is displayed as text. If you create a deal the status is Worksheet. For more information on deal status, see the Change the Status of a Deal section.
Vendor	This field displays the type of vendor, vendor ID, and name.

Table 4–8 (Cont.) Deal Header - Fields and Description

Fields	Description
Reporting Period	The deal reporting level determines the length of the reporting periods that would be created for income generation. The options provided depends on the calendar type that is being used in the Merchandising instance. For a 4-5-4 calendar, this can be Week, Month, or Quarter, while for a Gregorian calendar, only Month, or Quarter can be selected. Income is calculated once per reporting period. The reporting level also indicates the maximum frequency at which an invoice is raised against the income accrued by the deal. If quarterly processing is chosen, based on the end date for the deal, Merchandising may change the date of the final reporting period to an end of month date instead, if the end of the quarter is more than a month away, to allow for faster income realization. For example, if the end date of the deal is set for 17-Jan, but the end of the quarter is 30-Mar, Merchandising changes the last reporting period to 26-Jan, which is the nearest end of month date.
Billing Period	This field displays the time period for which invoice would be raised for the deal.
Turnover Measure	This field displays whether the turnover from the deal would be measured in quantity or value terms.
Activated Date	The activated date is the day from which the deal starts to be applied within the system.
Closed Date	The close date is the last day of the deal. This is required only for promotional deals.
Estimated Next Bill Date	The Estimated next invoice date gets populated initially based on the Bill Back period. It takes the last day of the period that will be invoiced. After the invoicing batch program Vendor Deal Invoicing (vendinvc) runs, this date is updated with a Gregorian week, month, or quarter, or the 4-5-4 week setup based on the calendar configuration in the system. This date can be modified throughout the deal's lifetime, even after approval until the last invoice against the deal has been processed.





Totals

The Total section displays the turnover and income values for deal components for all the valid periods. For turnover it has baseline, budget and actual values. It also shows if turnover totals are designated fixed for distribution among periods. For income it shows budget, actual/trend and actual/forecast values. In addition it also shows Budget Growth %, Total Turnover and Actual Monies Earned with respect to total deal to date.

Edit a Total of a Deal Component To edit total of a deal component:

1. From the More Actions menu, click **Deal Income**. The Deal Performance page appears, which includes the Total section.

Figure 4–15 Total Section

Total												
Actions ▾ View ▾     Detach												
Component	Description	Turnover					Income			Deal to Date		
		Baseline	Budget	Budget Fixed	Actuals / Forecast	Actuals / Forecast Fixed	Actuals / Trend	Budget	Actuals / Forecast	Actuals / Trend	Budget Growth %	Total Turnover
1	Other component	0.00	0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00	0.00	0.00	0.00	0.00	0.00
		0.00	0.00		0.00		0.00	0.00	0.00	0.00	0.00	0.00


- From the Actions menu, click **Edit** or click the Edit icon . The Edit Components Total pop-up appears.

Figure 4–16 Edit Component Total Pop-up

Edit Component Total

Component 1 | Vendor Funded Promotion

Turnover

Baseline 0.000

Budget 0.000

Actuals / Forecast 0.000

Fixed ☐

Fixed ☐

Target Baseline Growth % 0.000

Apply Growth%

OK

Cancel

- In the **Baseline** field Turnover sub section, enter or edit the previous year's turnover.
- In the **Budget** field Turnover sub section, enter or edit the expected amount of turnover.
- In the **Actuals/Forecast** field Turnover sub section, enter or edit the actuals or forecast amount.
- When the budget turnovers are set, select the **Fixed** check box to the right of the Budget field. Setting the budget **Fixed** signifies that the total value for the component will remain fixed despite any change in the value specific to any period. Any change will be divided over the other periods. If this is selected than you will not be able to apply growth % over the baseline to populate budget.

Note: Fixed can be checked against Actual/Forecast as well.

- In the **Target Baseline Growth %** field, enter the percentage you expect the baseline to grow.
- Click **Apply Growth%**.
- Click **OK** to save any changes and close the pop-up.
- Click **Cancel** to discard the changes and close the pop-up.

Note: Once a deal is approved, you can change only forecast values. Before that Baseline can also be changed.

This applies for both total and periods section.

Periods

The periods table shows the performance data for deal components broken down by deal reporting periods. The period end column displays the end date of the deal reporting period. You can enter or edit budgeted and baseline turnover for a particular period in this table.

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

Figure 4-17 *Periods - Actions Menu and Icons*

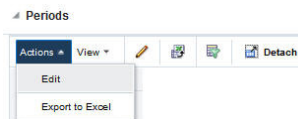


Table 4-9 Periods - Actions Menu/Icons/Buttons and Description

Actions Menu/Icons/Buttons	Description
Copy Baseline Turnover to Budget button	The Copy Baseline Turnover to Budget actions button on the periods table toolbar copies the Baseline Turnover to the budget turnover.

Edit Periods of a Deal Component

To edit periods of a deal component:


1. From the More Actions menu of the Deals page, click **Deal Income**. The Deal Performance page appears, which includes the Periods section


Figure 4–18 Periods Section


Periods


Actions

View








 Detach

Copy Baseline Turnover to Budget

Period End	Turnover				Income			
	Baseline	Budget	Actuals / Forecast	Actuals / Trend	Budget	Actuals / Forecast	Actuals / Trend	Actuals
10/22/16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

- From the Actions menu, click **Edit** or click the Edit icon . The Edit Period pop-up appears.

Figure 4–19 Edit Period Pop-up

3. In the **Baseline** field Turnover sub section, enter or edit the previous year's turnover.
4. In the **Budget** field Turnover sub section, enter or edit the expected amount of turnover.
5. In the **Actuals/Forecast** field Turnover sub section, enter or edit the actuals or forecast amount.
6. The total check boxes are view only. They would be checked if the totals for them have been checked fixed in the totals table.
7. Click **OK** to save any changes and close the pop-up.
8. Click **Cancel** to discard the changes and close the pop-up.

Proof of Performance

You can access the Proof of Performance page from the Deals page, **More Actions > Proof of Performance**. You can access Proof of Performance (POP) page at one of the following levels through the POP sub menu:

- Deal
- Deal Component
- Deal Component/Item Loc

The POP page is used to define the performance requirements at the deal level, component level, or at the item/location level. This allows the buyer to identify what needs to be done in order to receive the deal discount, which might be an advertisement, coupon distributions or 'in store' demonstrations of the product. POP terms are used only for informational purposes in Merchandising.

View/Create/Edit Proof of Performance Page

You can select the level at which you want to view, create, or edit for Proof of Performance definitions and fulfillment information. The options are: Deal, Deal/Component, Deal Component Item/Loc.

To view/create/edit proof of performance:

1. From the Tasks menu, select **Orders > Deals > Create Deal**. The Create Deal pop-up appears.
2. Enter the relevant data and click **OK** to save the changes. The Deal page appears.

3. From the More Actions menu of the Deal page, click **Proof of Performance**, and then click **Deal** or **Deal Component** or **Deal Component/Item Loc** depending on which level you want to define proof of performance.

The Proof of Performance page appears, which includes Terms Definition and Fulfillment sections.

For more information on Terms Definition and Fulfillment, see the [Add Proof of Performance Terms Definition](#) and the [Add Proof of Performance Fulfillment](#) section.

Figure 4–20 Proof of Performance Page

Proof of Performance Header

The Proof of Performance Header includes the following fields.

Table 4–10 Proof of Performance Header - Fields and Description

Fields	Description
Title	The title displays Deal ID and Deal Number to the top left of the head container. The Deal Status and the Currency is displayed with a separator between them to the top right of the head container. The deal number is populated by default. The supplier number, name, and the reference number are displayed.

Manage Terms

The Terms Definition section is used to define Proof of Performance terms for a given deal at deal, deal component or deal item-loc combination levels. These terms are defined by the deal partner that offers the deal.

Add Proof of Performance Terms Definition To add terms proof of performance definition:

1. From the More Actions menu of Deals page, click **Proof of Performance**, and then click **Deal Performance**.

The Proof of Performance page appears, which includes the Terms Definition section.

2. From the Actions menu, click **Add** or click the Add icon **+**. The Add Terms pop-up appears.

Figure 4–21 Add Terms Pop-up


The screenshot shows the 'Add Terms' pop-up window. It includes the following fields and sections:

- Type:** A dropdown menu.
- Duration:** A text input field.
- Duration Type:** A dropdown menu.
- Deal Ref. Item:** A text input field with a search icon.
- Dates:** A section with two columns:
 - Recommended:** Contains 'Start' and 'End' date pickers.
 - Planned:** Contains 'Start' and 'End' date pickers.
- Comments:** A large text area.
- Buttons:** 'OK', 'OK and Add Another', and 'Cancel' at the bottom right.


3. In the **Type** field, select type of performance term.
4. In the **Duration** field, enter the duration for the duration type for which the terms will be valid.
5. In the **Duration Type** field, select the period of time that you have to comply to the terms of the deal.
6. In the **Deal Ref. Item** field, enter the deal reference item or search for and select the deal reference item.
7. In the **Recommended Start** and **End** date fields, enter the vendor's recommended start and end dates or click the calendar icon and select the dates.
8. In the **Planned Start** and **End** date fields, enter the date you intend to start and end complying or click the calendar icon and select the dates.
9. Then choose one of the following options.
 - Click **OK** to save the changes and return to Proof of Performance page.
 - Click **OK and Add Another** to add more terms.
 - Click **Cancel** to reject all entries and close the pop-up.

Edit Proof of Performance Terms Definition To edit proof of performance terms definition:

1. Select the terms definition you want to edit.

2. From the Actions menu, click **Edit** or click the Edit icon . The Edit Terms pop-up appears.
3. Edit the enabled fields as necessary.
4. Click **OK** to save the changes.
5. Click **Cancel** to discard the changes and close the pop-up.

Delete Proof of Performance Terms Definition To delete proof of performance terms definition:

1. Select the terms definition you want to delete.
2. From the Actions menu, click **Delete** or click the Delete icon .
You are prompted to delete the proof of performance term.
3. Click **Yes** to confirm deletion.
4. Click **No** to retain the proof of performance term.

Manage Fulfillment

The fulfillment section is used to record or view proof of performance term fulfillment for a deal.

Add Proof of Performance Fulfillment To add proof of performance fulfillment:

1. From the More Actions menu, click **Proof of Performance**, and then click **Deal Performance**.

The Proof of Performance page appears, which includes the Fulfillment section.

Note: Fulfillments are specific to terms. You can add fulfillment only after you have added terms definition.


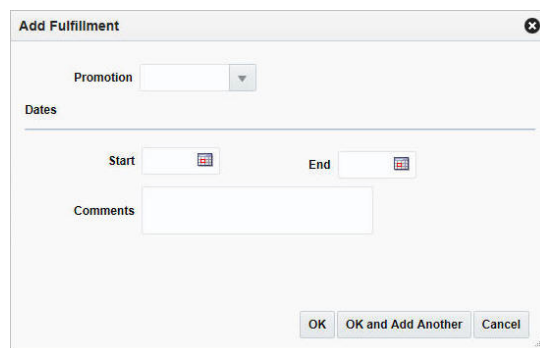
2. From the Actions menu, click **Add** or click the Add icon . The Add Fulfillment pop-up appears.

Figure 4–22 Add Fulfillment Pop-up



3. In the **Promotion** field, enter, select or search for a promotion.
4. In the Dates area:
 - In the **Start Date** field, enter the start date of the promotion, or click the calendar icon and select a date.

- In the **End Date** field, enter the end date of the promotion, or click the calendar icon and select a date.
- 5. In the **Comments** field, enter any additional comments as necessary.
- 6. Click **OK** to add fulfillment. You can add more fulfillment by clicking **OK** and **Add Another**.
- 7. Click **Cancel** to close the fulfillment pop-up.

Delete Proof of Performance Fulfillment To delete proof of performance fulfillment:

1. Select the proof of performance you want to delete.
2. From the Actions menu, click **Delete** or click the Delete icon ✕.
You are prompted to delete the proof of performance fulfillment.
3. Click **Yes** to confirm deletion.
4. Click **Cancel** to retain the record.

Manage Referenced Promotions

The Referenced Promotions option opens the Deal Promotions. This page allows you to associate a deal with a promotion. Multiple promotions can be attached to a deal. The promotion is set up in the pricing system and can then be attached to the deal.

Add Promotions to a Deal

To add promotions to a deal:

1. From the More Actions menu, click **Referenced Promotions**.
The Deal Promotions pop-up appears.
2. From the Actions menu, click **Add** or click the Add icon +. The Add Promotions pop-up appears

Figure 4–23 Add Promotions Pop-up

3. In the **Promotion** field, enter, select or search for a promotion.
4. Click **OK** to save any changes.
5. You can add more promotions by clicking **OK** and **Add Another**.
6. Click **Cancel** to discard the changes and close the pop-up.
7. Click **Save** to save your changes or click **Save and Close** to save and close the pop-up.

Delete Deal Promotions

To delete deal promotions:

1. Select the deal promotions you want to delete.

- From the Actions menu, click **Delete** or click the Delete icon ✕.
You are prompted to delete the record.
- Click **Yes** to confirm deletion.
- Click **Cancel** to retain the record.

View Threshold Revisions

The threshold revisions pop-up is visible when revisions exist for a threshold.

To view the threshold revisions pop-up:

- From the Tasks menu, select **Orders > Deals > Create Deal**. The Create Deal pop-up appears.
- Enter the relevant data and click **OK** to save the changes. The Deal page appears.
- In the Deal page, go to Thresholds section and then click **Revisions**. The Threshold Revisions pop-up appears.

Figure 4–24 Threshold Revisions Pop-up

Revision No.	Lower Limit	Upper Limit	Value	Total / Unit	Target Level	Date	Action	Amendment Co
1	10	34.88	0.99	Total	—	6/1/2013	Update	
1	35	50.123	0.24	Unit	✓	6/1/2013	Insert	
1	51	65	0.33	Unit	—	6/1/2013	Insert	
2	51	65	0	Unit	—	6/1/2013	Delete	

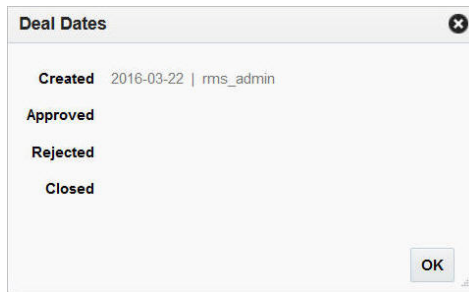
View Deal Dates

Deal Dates is a view only pop-up to show the dates related to a deal.

View Deal Dates

To view deal dates:

- From the More Actions menu, select **Deal Dates**. The Deal Dates pop-up appears.

Figure 4–25 Deal Dates Pop-up

2. Click **OK** to close the deal dates pop-up.

Create a Fixed Deal

The Fixed Deal page allows you to define the following deal specific information:

- Deal details
- Merchandise hierarchy against which deal can be claimed
- Location information at which deal can be claimed
- Promotion Details against which supplier has negotiated the deal


You can also define the terms and fulfillment that is negotiated with the vendor. This information can be entered through Proof of Performance page which is displayed by clicking **the Proof of Performance** button on the Fixed Deal page.

With fixed deals, your organization receives payments from vendors in return for mentioning their products in promotions or for displaying their products on prime shelf space. Fixed deal payments can be claimed from the vendor either periodically or all at once.

You can create fixed deals and set up a collection schedule, from which you can make claims against the vendor and receive payments.

Fixed deals are typically created in Active status; however, you can create a fixed deal in Inactive status. For deals with Inactive status claims are put on hold.

The Fixed Deal Report provides you with information about active claims. Claim information for inactive fixed deals is not included in the report.

Note: You can also create a fixed deal by clicking **Create** in the Actions menu, or by clicking the Create icon  on the Fixed Deal Search page.

The Fixed Deal page includes the following sections:

- [Fixed Deal Header](#)
 - Deal Collection
 - Invoice
- [Merchandise Hierarchy](#)

If the deal is associated to the merchandise hierarchy, then the Merchandise Hierarchy section appears.

- [Locations](#)

This section appears if you select **Merchandise** in the Deal header section.

- [Manage Referenced Promotions](#)
- [Fixed Deal Toolbar](#)

Figure 4–26 Fixed Deal Page

Create a Fixed Deal

To create a fixed deal:


1. From the Tasks menu, select **Orders > Deals > Manage Fixed Deal**. The Fixed Deal Search page appears.
2. From the Actions menu, select **Create** or click the Create icon . The Fixed Deal widow appears.

Figure 4–27 Fixed Deal Page

The screenshot shows the 'Fixed Deal' page in a software application. The page has a header with 'Fixed Deal Search' and 'Fixed Deal' tabs. The main content area is divided into several sections:

- Deal 595001**: A section with fields for Description, Vendor, Type, Amount, Org Unit, Merchandise (checked), Non Merch Code, VAT (checked), and VAT Code.
- Deal Collection**: A section with fields for Collect, First Collect Date, Last Collect Date, and Collect Periods.
- Invoice**: A section with fields for Processing Logic and Debit Note / Credit Note.
- Merchandise Hierarchy**: A section with a table showing Department, Class, and Subclass. The table is currently empty with the message 'No data to display.'
- Locations**: A section with a table showing Type, Location, Location Name, and Ratio. The table is currently empty with the message 'No data to display.'
- Promotions**: A section with a table showing Promotion and Description. The table is currently empty with the message 'No data to display.'

At the bottom of the page, there is a footer with buttons: Deactivate, Proof of Performance, Save, Save and Close, and Cancel.

For more information on how to create a fixed deal, see the [Create a Fixed Deal](#) section.

Fixed Deal Header

The Fixed Deal Header includes the following fields.

Table 4–11 Fixed Deal Header - Fields and Description

Fields	Description
Title	The title displays Fixed Deal ID to the top left of the head container. The Deal Status is displayed to the top right of the head container. This field contains the deal number by default.
Description	Enter a description of the fixed deal.
Vendor	Select or search for the type of fixed deal vendor.
Type	Select the type of payment.
Amount	Enter the payment amount from the supplier.
Org Unit	Enter, select or search for an organizational ID.
Merchandise	If the deal is associated to the merchandise hierarchy, select the Merchandise check box. For more information on Merchandise Hierarchy, see Merchandise Hierarchy .
Non Merch Code	Enter, select or search for the non merchandise code. The Non Merch field is required only if the Merchandise check box is not selected.
VAT	If VAT is included in the deal, select the VAT check box.

Table 4–11 (Cont.) Fixed Deal Header - Fields and Description

Fields	Description
VAT Code	Enter, select or search for the VAT code to apply to the fixed deal.
Deal Collection section:	
Collect	Select how often payment for the fixed deal is collected from the supplier. If you select Date in the Collect field, the number of collection period is always one.
First Collect Date	Enter the date, or click the calendar icon and select the date. The date of the collection of the first amount decided as part of the fixed deal.
Deal Collection section:	
Collect Periods	Enter the number of collection periods.
Last Collect Date	If you enter the date in the First Collect Date field, the Last Collect Date field is displayed by default. The number of times the collection date is to be repeated after the First Collect Date. On each collection date an invoice may be raised based on the invoicing options selected for the deal.
Invoice section:	
Processing Logic	Select how invoices are created for the fixed deal. The options of creating invoices are: Automatic, Manual, No Invoice Processing depending on the option selected.
Debit Note/Credit Note	Select whether you want to send a Debit or Credit Note request to the supplier.

Merchandise Hierarchy

The merchandise hierarchy allows you to create the relationships that are necessary in order to support the product management structure of a company. You can assign a buyer and merchandiser at the division, group, and department levels of the merchandise hierarchy. You can also link a lower level to the next higher level. For example, you can indicate which group a department belongs to or which division a group belongs to.

The location section appears if you select **Merchandise** in the Deal header section.

Add Merchandise Hierarchy

To add merchandise hierarchy:

1. In the Fixed Deal page, go to Merchandise Hierarchy section.
2. From the Actions menu, select **Add** or click the Add icon **+**. The Add Merchandise Hierarchy pop-up appears.


Figure 4–28 Add Merchandise Hierarchy Pop-up

 A screenshot of the 'Add Merchandise Hierarchy' pop-up dialog box. It features a title bar with a close button. The main area contains four dropdown menus: 'Merchandise Level' (marked with an asterisk), 'Department', 'Class', and 'Subclass'. At the bottom, there are three buttons: 'OK', 'OK and Add Another', and 'Cancel'.

3. In the **Merchandise Level** field, click the merchandise level list and select the merchandise level that the deal applies to. This field is a required field.
4. In the **Department** field, select or search for the department.
5. In the **Class** field, select or search for a class.
6. In the **Subclass** field, select or search for a subclass.
7. Then choose one of the following options.
 - Click **OK** to save any changes and close the pop-up.
 - Click **OK and Add Another** to add additional merchandise hierarchies.
 - Click **Cancel** to discard the changes and close the pop-up.

Delete Merchandise Hierarchy

To delete merchandise hierarchy:

1. Select the merchandise hierarchy you want to delete.
2. From the Actions menu, select **Delete** or click the Delete icon .
- You are prompted to delete the record.
3. Click **Yes** to confirm deletion.
4. Click **Cancel** to retain the record.

Locations

The Locations section allows you to indicate at which locations the deal is effective.

Create Locations to a Fixed Deal

You can create locations when a fixed deal is created in the Fixed Deal page.

To create the locations to a fixed deal:


1. In the Fixed Deal page, go to Locations section.
2. From the Actions menu after entering the header details, click **Create** or click the Create icon . The Add Locations pop-up appears.


Figure 4–29 Add Locations Pop-up

 A screenshot of the 'Add Location' pop-up dialog box. It features a title bar with a close button. The main area contains three fields: 'Type' (marked with an asterisk and a dropdown arrow), 'Location' (a dropdown menu), and 'Ratio' (marked with an asterisk and a text input field). At the bottom, there are three buttons: 'OK', 'OK and Add Another', and 'Cancel'.

3. In the **Type** field, select the location type you want to add to the fixed deal. This field is a required field.
4. In the **Location** field, enter, select or search for the location. You can also search for a location through Basic or Advanced search.
5. In the **Ratio** field, indicate what percentage of fixed deal the location contributes.
6. Then choose one of the following options.
 - Click **OK** to add the location to the table and close the pop-up.
 - Click **OK and Add Another** to add additional locations.
 - Click **Cancel** to reject all entries and close the pop-up.

Delete Locations

To delete locations:

1. Select the locations you want to delete.
2. From the Actions menu, click **Delete** or click the Delete icon .
You are prompted to delete the locations.
3. Click **Yes** to confirm deletion.
4. Click **Cancel** to retain the record.

Fixed Deal Toolbar

For information about the toolbar, see “Screen Level Action - Icons and Buttons” in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

Create from an Existing Deal

To create a deal from an existing deal, follow the steps below.


1. From the Tasks menu, select **Orders > Deals > Manage Deal**. The Deal Search page appears.
2. From the Actions menu, select **Create from Existing** or click the Create from Existing icon . The Create from Existing pop-up appears.

Figure 4–30 Create From Existing Pop-up

Create Deal From Existing

Deal 745001

Vendor Supplier 153 Bharti_Supplier

Currency USD

Timing Annual

Active Date

Close Date

Billing Type Off-Invoice

Threshold Limit Type Quantity - number of Units

Threshold Limit UOM EA

Recalculate Approved Orders ☒

Security ☐

Ref. No.

Comments

OK Cancel

3. Click **OK** to create a deal from an existing deal.
4. Click **Cancel** to return to Deal Search page.

Manage Fixed Deals

The Manage Fixed Deals option opens the Fixed Deal Search page. Managing a fixed deal involves performing one or more of the following tasks:

- Searching for a fixed deal
- Creating a fixed deal
- Editing a fixed deal
- Viewing a fixed deal

On clicking the Manage Fixed Deal link by selecting **Orders > Deals > Manage Fixed Deal**, the Fixed Deal Search page appears.

In the Fixed Deal Search page you can search, add, create, view, export to Excel, query by example, and detach deals. You can also create deals for items on a specific purchase order.

The Fixed Deal Search page includes the following sections:

- Search
 - For more information on the Fixed Deal Search page, see the [Search for a Fixed Deal](#) section.
- [Results](#)
- [Fixed Deal Search Toolbar](#)

Figure 4–31 Fixed Deal Search Page

Manage a Fixed Deal

To manage a fixed deal use the Actions menu, View menu and icons in the Merchandise Hierarchy section.

You can access the Terms Definition and Fulfillment sections by clicking the Proof of Performance button. For information on Terms Definition and Fulfillment of a fixed deal, see the [Manage Terms](#) and the [Manage Fulfillment](#) section.

Search for a Fixed Deal

To search for a fixed deal:

1. From the Tasks menu, select **Orders > Deals > Manage Fixed Deal**. The Fixed Deal Search page appears.
2. You can search a fixed deal by providing search criteria in the search section. The criteria can be provided either Basic or Advanced mode, depending on the requirement. Basic is the default mode when the search page is entered. Click **Advanced** to access the search panel in advanced mode. You can return to Basic mode by clicking **Basic**.

Search For a Fixed Deal Through the Basic Search Criteria

To search for a fixed deal through the basic search criteria:

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

Table 4–12 Fixed Deal Search - Basic Search Criteria and Description

Search Field	Description
Match	<p>You can match your search criteria by selecting All or Any radio button.</p> <ul style="list-style-type: none"> ■ All - Only deals matching all entered search criteria are shown. ■ Any - Deals matching each entered search criteria are shown.
Deal	Enter the deal ID.
Description	Enter the description of the deal.
Deal Type	This is the reason for the payment and does not drive any functionality. However, it allows the quick grouping of fixed deals for custom reporting. The options are: Cancel Allowance, Allowance Non Performance, Display Allowance, Early Buy Allowance, New Discount, New Warehouse, Lump Sum, New Item Allowance, Slotting Allowance, New Distribution Allowance, Advertising Allowance, Other Allowance, Scan Based Allowance.
Status	Select the status of the deal. The options are: Active and Inactive.
Partner	Enter, select or search for the type of partner for which you are creating the fixed deal.
Supplier	Enter, select or search for the supplier ID for which you want to create a fixed deal.
First Collect Date	Enter the date, or click the Calendar icon and select the date.
Last Collect Date	Enter the date, or click the Calendar icon and select the date.

- Click on the Saved Search list to select one of the saved search criteria. Selecting a saved search populates the search section with the saved search criteria. If the run automatically function is enabled for the search, the search is executed immediately.

You can also personalize your saved searches by selecting **Personalize**. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see Personalize Saved Search in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

- Click **Search**. The fixed deals that match the search criteria are displayed in the Results section.
- Click **Reset** to clear the search section and results.
- Click **Save As...** to save the current search criteria. The Create Saved Search pop-up appears.

For more information about how to save your search criteria, see Create Saved Search in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

- Click **Done** to close the pop-up.

Search a Fixed Deal Through the Advanced Search Criteria

To search a fixed deal through the 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 on the Saved Search list to select one of the saved search criteria. Selecting a saved search populates the search section with the saved search criteria. If the run automatically function is enabled for the search, the search is executed immediately.

You can also personalize your saved searches by selecting **Personalize**. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see Personalize Saved Search in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

4. Click **Search**. The fixed deals that match the search criteria are displayed in the Results section.
5. Click **Reset** to clear the search section and results.
6. Click **Save As...** to save the current search criteria. The Create Saved Search pop-up appears.

For more information about how to save your search criteria, see Create Saved Search in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

7. 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.
8. 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.
9. Click **Done** to close the page.

Results

The Results section lists the retrieved fixed deals.

Fixed Deal Search Toolbar

For information about the toolbar, see “Screen Level Action - Icons and Buttons” in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

Edit a Fixed Deal

To edit a Fixed deal:

1. From the Tasks menu, select **Orders > Deals > Manage Fixed Deal**. The Fixed Deal Search page appears.
2. Select the deal you want to edit.


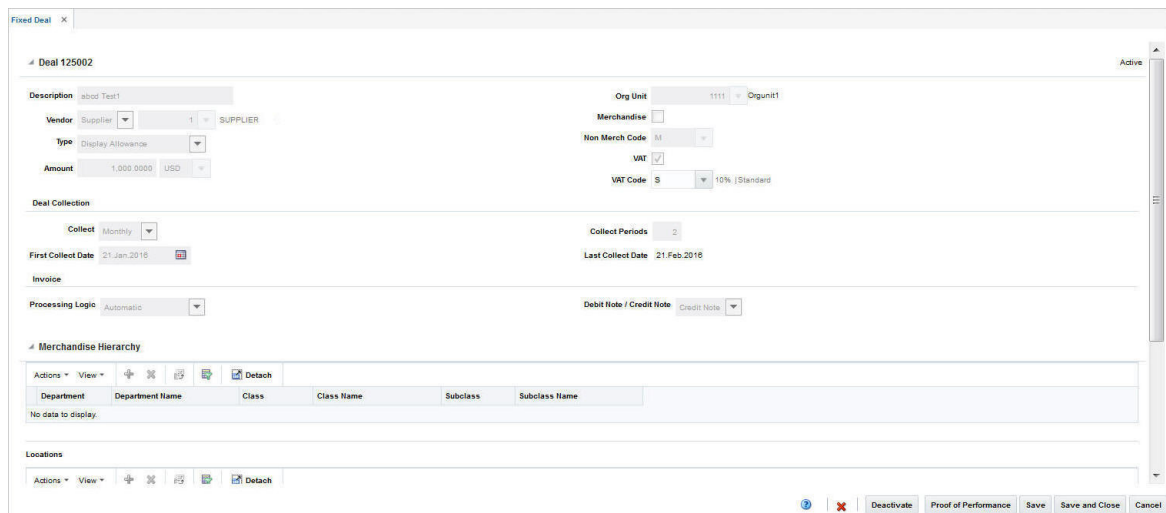
- From the Actions menu, select **Edit** or click the Edit icon . The Fixed Deal page appears.

Figure 4–32 Fixed Deal Page in Edit Mode



Fixed Deal x

Deal 125002 Active

Description: abcd Text1

Org Unit: 1111 OrgUnit1

Vendor: Supplier 1 SUPPLIER

Merchandise: ☐

Type: Display Allowance

Non Merch Code: M

Amount: 1,000,000 USD

VAT: ☒

VAT Code: S 10% | Standard

Deal Collection

Collect: Monthly

Collect Periods: 2

First Collect Date: 21 Jan 2016





Last Collect Date: 21 Feb 2016

Invoice

Processing Logic: Automatic





Debit Note / Credit Note: Credit Note



Merchandise Hierarchy

Actions View     Detach

Department	Department Name	Class	Class Name	Subclass	Subclass Name
No data to display.					

Locations

Actions View     Detach

  Deactivate Proof of Performance Save Save and Close Cancel

- Make the necessary changes and click **Save** to save the changes.

View a Fixed Deal

To view a fixed deal:


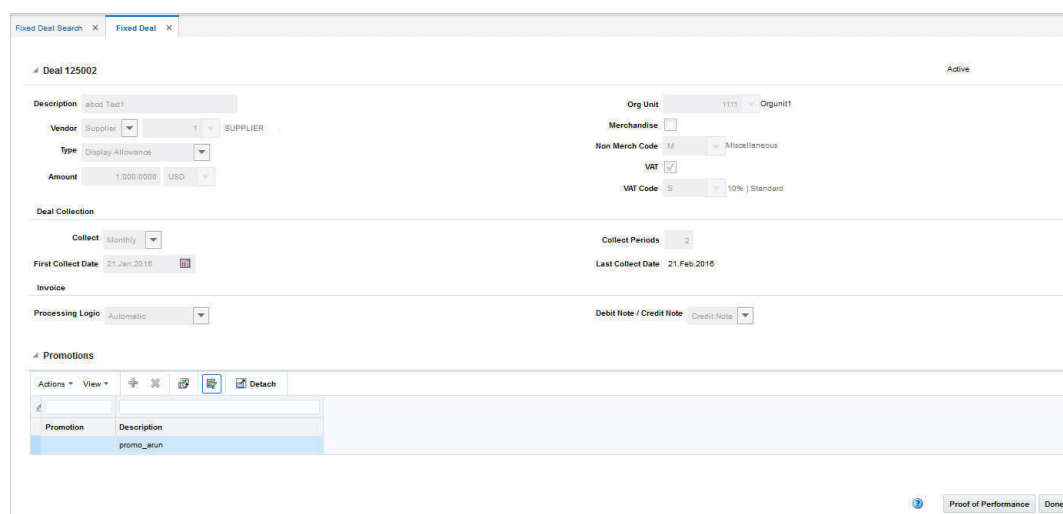
- From the Tasks menu, select **Orders > Deals > Manage Fixed Deal**. The Fixed Deal Search page appears.
- Enter additional criteria as desired to make the search more restrictive.
- Select the deal you want to view.
- From the Actions menu, select **View** or click the View icon . The Fixed Deal page appears.

Figure 4–33 Fixed Deal Page in View Mode



Fixed Deal Search x Fixed Deal x

Deal 125002 Active

Description: abcd Text1

Org Unit: 1111 OrgUnit1

Vendor: Supplier 1 SUPPLIER

Merchandise: ☐

Type: Display Allowance

Non Merch Code: M Miscellaneous

Amount: 1,000,000 USD

VAT: ☒

VAT Code: S 10% | Standard

Deal Collection

Collect: Monthly

Collect Periods: 2

First Collect Date: 21 Jan 2016





Last Collect Date: 21 Feb 2016

Invoice


Processing Logic: Automatic

Debit Note / Credit Note: Credit Note

Promotions

Actions View     Detach

Promotion	Description
promo_arun	

 Proof of Performance Done

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

Activate/Deactivate a Fixed Deal

A fixed deal present in the system might need to be activated or deactivated at different points of time based on the specific requirements of the business. This activation/deactivation of the deal can be done using the process mentioned below.

Activate a Fixed Deal

Any fixed deal is created within the system is in Active state by default. However, if any active deal has been previously deactivated and is currently in the Inactive state, it can be activated using the Activate button in the Fixed Deal page. Clicking Activate will also change the label on the button to read Deactivate, to provide an option for future deactivation.

Deactivate a Fixed Deal

Any deal which is in Active status can be deactivated using the Deactivate button in the Fixed Deal page. This can be done while creating the deal or later via an Edit operation. Clicking the Deactivate button will also change the label on the button to read Activate, to provide an option for future activation.

The screenshot shows the Oracle Merchandising interface for a Fixed Deal. The deal is titled 'Deal 45001' and is currently in an 'Active' state. The page is divided into several sections: Deal Information, Deal Collection, Merchandise Hierarchy, and Locations. The Deal Information section includes fields for Description, Vendor, Supplier, Amount, and Org Unit. The Deal Collection section includes fields for Collect, First Collect Date, Last Collect Date, and Processing Logic. The Merchandise Hierarchy section shows a tree view of departments and products. The Locations section shows a table of locations with columns for Type, Location, Location Name, and Ratio.

Type	Location	Location Name	Ratio
Store	1111	Manhattan	1
Store	1211	Minneapolis	1
Store	1311	Dallas	1
Store	1411	Los Angeles	1
Store	1511	Seattle	1

Delete a Fixed Deal

Proof of Performance

Manage Terms

The Terms Definition section is used to define proof of performance terms for a given fixed deal. These terms are defined by the deal partner that offers the deal.

Add a Fixed Deal Terms Definition To add fixed deal terms definition:

1. From the Tasks menu, select **Orders > Deals > Create Fixed Deal**. The Fixed Deal page appears.

2. Click **Proof of Performance**.

The Proof of Performance page appears which includes the Terms Definition and Fulfillment sections.


3. From the Actions menu, click **Add** or click the Add icon **+**. The Add Terms pop-up appears.

Figure 4–34 Add Terms Pop-up

4. In the **Type** field, select what must be done to comply with the terms of the deal.
5. In the **Duration** field, enter the duration for which the terms will be valid.
6. In the **Duration Type** field, select the period of time that you have to comply to the terms of the deal.
7. In the **Deal Ref. Item** field, enter the deal reference item or search for and select the deal reference item.
8. In the **Recommended Start** and **End** date fields, enter the vendor's recommended start and end dates or click the calendar icon and select the dates.
9. In the **Planned Start** and **End** date fields, enter the date you intend to start and end complying or click the calendar icon and select the dates.
10. In the Comments field, add a comment if necessary.
11. Then choose one of the following options.
 - Click **OK** to the terms and close the pop-up.
 - Click **OK and Add Another** to add additional terms.
 - Click **Cancel** to reject all entries and close the pop-up.

Edit Fixed Deal Proof of Performance Terms Definition To edit proof of performance terms definition:


1. Select the proof of terms definition you want to edit.

2. From the Actions menu, click **Edit** or click the Edit icon .

The Edit Terms pop-up appears.

3. Edit the enabled fields as necessary.
4. Click **OK** to save the changes.

Delete a Fixed Deal Proof of Performance Terms Definition To delete proof of performance terms definition:

1. Select the proof of performance you want to delete.
2. From the Actions menu, click **Delete** or click the Delete icon .
- You are prompted to delete the proof of performance term.
3. Click **Yes** to confirm deletion.
4. Click **Cancel** to retain the record.

Manage Fulfillment

The Fixed Deal Fulfillment section is used to record or view proof of performance term fulfillment for a fixed deal.

Recording the fulfillment of these terms is a manual process and no fulfillment is calculated from other merchandising transactions.

An example: A supplier may define a proof of performance stating: "In order to qualify for the deal, the retailer needs to promote the item by displaying it on an end cap for 28 days." You may want to enter the start and end dates of the display period and/or promotion as a proof of performance fulfillment requirement.

Add a Fixed Deal Proof of Performance Fulfillment To add fixed deal proof of performance fulfillment:

1. From the Tasks menu, select **Orders > Deals > Create Fixed Deal**. The Fixed Deal page appears.
2. Click **Proof of Performance**.

The Proof of Performance page appears which includes the Terms Definition and Fulfillment sections.

Note: You can add fulfillment only if you add terms definition.



3. From the Actions menu, click **Add** or click the Add icon .
- The Add Fulfillment pop-up appears.

Figure 4–35 Add Fulfillment Pop-up

4. In the Promotion field, enter, select or search for a promotion.
5. In the Dates area:
 - In the **Start Date** field, enter the start date of the promotion, or click the calendar icon and select a date.
 - In the **End Date** field, enter the end date of the promotion, or click the calendar icon and select a date.
6. Then choose one of the following options.
 - Click **OK** to the fulfillment and close the pop-up.
 - Click **OK and Add Another** to add fulfillments.
 - Click **Cancel** to reject all entries and close the pop-up.
7. Click **Save** to save your changes or click **Save and Close** to save and close the pop-up.

Delete a Fixed Deal Proof of Performance Fulfillment To delete fixed deal proof of performance fulfillment:

1. Select the proof of performance you want to delete.
2. From the Actions menu, click **Delete** or click the Delete icon .

You are prompted to delete the proof of performance fulfillment.
3. Click **Yes** to confirm deletion.
4. Click **Cancel** to retain the record.

Manage Referenced Promotions

The Promotions page allows you to associate a fixed deal with promotions. You can attach multiple promotions to a fixed deal. The promotion is set up in the pricing system and can then be attached to the fixed deal.

Add Promotions to a Fixed Deal

To add promotions to a fixed deal:


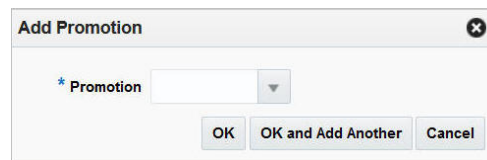

1. In the Fixed Deal page, go to Promotions section.
2. From the Actions menu, click **Add** or click the Add icon . The Add Promotions pop-up appears.

Figure 4–36 Add Promotions Pop-upA screenshot of a web-based 'Add Promotion' pop-up dialog box. The dialog has a title bar with the text 'Add Promotion' and a close button (X) on the right. Inside the dialog, there is a label '* Promotion' followed by a text input field and a dropdown arrow. Below the input field, there are three buttons: 'OK', 'OK and Add Another', and 'Cancel'.

3. In the **Promotion** field, enter, select or search for a promotion. You can also search for promotions through Basic or Advanced search.
4. Then choose one of the following options.
 - Click **OK** to add the promotion to the table and close the pop-up.
 - Click **OK and Add Another** to add additional promotions.
 - Click **Cancel** to reject all entries and close the pop-up.

Delete Fixed Deal Promotions

To delete fixed deal promotions:

1. Select the fixed deal promotions you want to delete.
2. From the Actions menu, click **Delete** or click the Delete icon .
You are prompted to delete the record.
3. Click **Yes** to confirm deletion.
4. Click **Cancel** to retain the record.