Oracle® Retail Pricing Cloud Service

Clearance User Guide

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Preface

This document describes the Oracle Retail Import Management 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 Import Management Cloud Service. This includes merchandisers, buyers, business analysts, and administrative personnel.

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

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(Data Model documents can be obtained through My Oracle Support.)

Conventions

The following text conventions are used in this document:

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

1

Clearance Overview

A clearance event is designed to clear out-of-date merchandise and slow-selling merchandise out of stores and warehouses. A clearance markdown is considered a permanent price change, and inventory is consequently revalued when it goes into effect. Item/location combinations on clearance can be optionally reset back to regular price. This may be done if an item will be brought back for a new season. When the reset date for a clearance has passed, the item's price and inventory value is returned to the regular price. In Pricing, clearance events are organized into groups. Clearance groups allow you to better manage your clearance events by keeping related markdowns and/or resets together and support mass update and approval for events in the group. The following clearance events can be created in a group:

- **Markdown –** Discounts the selling price of one or more item/location combinations.
- **Reset –** A reset will close out the clearance event, setting the item/location combinations back to the last regular retail price.

When a clearance event is created, it must go through a series of checks before it can be applied to an item/location. A clearance may be in any of the following statuses:

Table 1–1 Clearance Status

Status	Definition
Worksheet	The clearance has been created, but not reviewed or able to be executed.
Submitted	The conflict checking has been completed, if applicable, and the event is pending approval. Conflict checking is run for clearances that have been submitted based on the setting of a system parameter.
Approved	The clearance has passed all conflict checking and has been approved and will be sent to the store or warehouse for execution based on a system option defined number of days prior to its effective date.
Executed	The markdown or reset has been made effective for the item/locations on the event.
Rejected	The clearance event has been reviewed but could not be approved without updates.
Processing	The clearance is being processed in conflict checking.

Best Practices

When creating clearance events for a group of items, it is recommended to enter the item data at the highest level possible. For fashion items, this is generally parent item (style) or parent/diff (style/color), whereas for grocery and hardlines this is generally at the transaction item level (SKU). This is also true for the selection of locations; it is recommended that clearance event are created at zone level, rather than by store or warehouse. This provides the following advantages:

1. Managing price events at the higher levels will increase the usability of the application by having fewer rows for you to manage. It will also help ensure pricing consistency for similar items and locations, in line with your company pricing strategy.
2. The Future Retail tables will have the ability to store data at the highest level possible which, in turn, will ensure that Pricing Cloud Service will run as efficiently as possible, including response time for processing and screen flow.

Emergency Price Events

There is a system option, called Price Event Processing Days, that is set to designate the number of days required between the current date and the effective date of a price event. This ensures that clearances are created and approved with enough advance timing that stores and other impacted areas can react accordingly.

However, for situations where price events were missed for one or more items or locations, emergency price events can be created. This allows you to create events that go into effect less than the standard number of processing days, which can even include the current date. A separate security privilege provides the ability to limit the users that can create these emergency events, while preventing others who have the ability to create clearance events from creating emergency events. For example, if the setting for price event processing is 3 days, you will be prevented from creating or approving an event that occurs within 3 days, unless you have emergency security privilege.

When an emergency price event is created and approved, the information is passed to downstream systems the next time the batch extracts are run. If the clearance is to go into effect on the current date, then the item/location price in Merchandising is updated on approval, along with any markdowns or markups in the stock ledger.

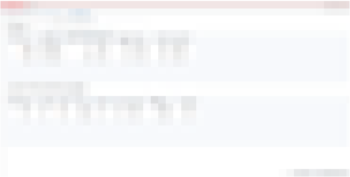
2

Create a Clearance Markdown

If you would like to create a new markdown for an item/location, you can do so by adding it to an existing group or creating a new group. Creating a new clearance group can be done by selecting the Create Clearance Group task from the Task List, or selecting the Create action from the Clearance Group Search screen. Either of these steps create a new Clearance Group into which markdown can be added.

To add markdowns to an existing Clearance group, perform a search for the clearance group that you want to edit. See Search for a Clearance Group. From the search results pane of the Clearance Group Search page, highlight the clearance group to which you want to add a clearance markdown and select **Edit** from the Actions menu. The Clearance Group page appears.

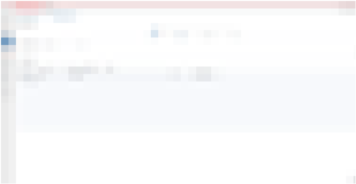
Figure 2–1 Clearance Group



Add Items

The initial page in the Markdown Wizard allows you to select the items that you want to add to the markdown.

Figure 2–2 Add Markdown Items Page



1. From the Item Markdowns table, select **Add** from the Actions menu

   The Add Markdown Wizard launches.

2. From the Add Markdown Items page, enter the items to add to the new markdown using the following criteria:

Table 2–1 Items Page Fields

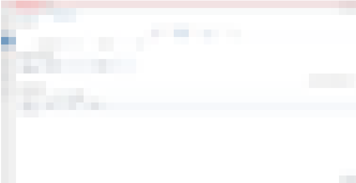
Field	Description
Add Items by	The Add Items by field allows you to select a category by which you can narrow the list of things to add to the markdown. Options are: ▪ Item ▪ Parent/Diff ▪ Item List ▪ Upload List
Item	The Item field is active if you select Item in the Add Items by field. Click the magnifying glass to search for an item to add to the markdown.
Parent/Diff	When Parent/Diff is selected for 'Add Items by' the display of the screen changes, showing an item field and diff type field as the top row, with a Diffs table directly below. Entering an Item and Diff type will populate the diff table where diffs can then be selected. Combinations of the entered parent item and the selected diffs are added to the Selected Items table when the apply button is selected.
Diff Type	The Diff Type field is active if you select Parent/Diff in the Add Items by field.
Item List	The Item List field is active if you select Item List in the Add Items by field. Click the dropdown to select a defined list of items to add to the markdown.
Source File	Source File is active if you select Upload List in the Add Items by field. Click **Browse** to select the file to upload.

3. Once you have entered your criteria, click **Apply** to move entered or selected data for the item selection option to the Selected Items table. In the case of an Item List or Upload List, the items in the list are populated into the Selected Items table. Once all your items are added to the markdown, click **Next**. The Add Markdown Locations page appears. Continue with Add Locations.

Add Locations

The Locations page of the Markdown Wizard allows you to define the locations associated with the markdown.

Figure 2–3 Add Markdown Locations Page



1. From the Add Markdown Location page, select the location type you want to use for adding locations using the following criteria:

Table 2–2 Locations Page Fields

Field	Description
Add Locations by	The Add Locations by field allows you to select a category by which you can narrow the list of locations to add to the markdown. Options are: ▪ Zone ▪ Location List ▪ Store ▪ Warehouse **Note:** The Warehouse option is only displayed if the Recognize Warehouses as Locations system option is set to Yes.
Zone Group	The Zone Group field is active if you select Zone in the Add Locations by field.
Zone Table	The Zone Table is active if you select Zone in the Add Locations by field. When a zone group is entered, the Zone Table will be populated with the zones in the zone group.

Table 2–2 (Cont.) Locations Page Fields

Field	Description
Apply Locations within Selected Zones	The Apply Locations within Selected Zones check box is active if you select Zone in the Add Locations by field. This checkbox allows exploding the zone into stores and warehouses for populating the Selected Locations table. If you have access to one location in a zone, you can create events for the entire zone and markdowns can be created for all locations under the zone after exploding the zone.
Location List	The Location List dropdown list is active if you select Location List in the Add Locations by field. Click the dropdown to select from a defined list of locations to add to the markdown.
Store	The Store dropdown list is active if you select Store in the Add Locations by field. Click the dropdown to select from a defined list of stores to add to the markdown.
Warehouse	The Warehouse dropdown list is active if you select Warehouse in the Add Locations by field. Click the dropdown to select from a defined list of warehouses to add to the markdown.

2. From the search results pane, select the location(s) to add to the markdown and click **Apply**.
3. Once all your locations are added to the markdown, click **Next**. The Add Markdown page appears. Continue with Add Markdown.

Add Markdown

The Add Markdown page of the Markdown Wizard allows you to define the enter a single markdown or use a Cadence Template to generate multiple related markdowns for the item/location combinations. The screen has two different views, a Single Markdown view and a Template view base on the value selected in the Cadence dropdown. Below are the two views:

Figure 2–4 Add Markdown Page – Single Markdown View

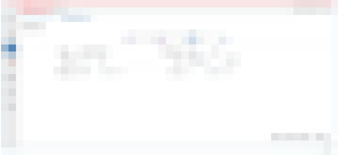
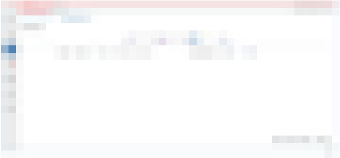


Figure 2–5 Add Markdown Page



1. From the Add Markdown page, define the information for the markdown being added using the following criteria:

Table 2–3 Markdown Page Fields

Field	**Description**
Cadence	This field is used to decide whether a single markdown or multiple markdowns will be created for each item/location combination based on the cadences in the template. The options are: ▪ Single Markdown ▪ Template When Template is selected, the wizard will create multiple markdowns for the item/locations selected based on the number of markdowns defined in the template.
Template	Select the template you which to use to generate multiple markdowns for the item/location combinations selected. This field only shown in the Cadence Template view of the Add Markdown screen.
Initial Effective Date	Enter the date on which you want the first markdown of the cadence template to take effect. The effective date of subsequent markdowns is based on the initial effective date plus the days after first markdown parameter from the template. This field only shown in the Cadence Template view of the Add Markdown screen.
The fields described below are only shown on the Single Markdown view of the Add Markdown screen.	
Markdown	The Markdown field contains a predefined identifier for the Markdown to describe what the new markdown represents in the clearance lifecycle. For example, this could be first, second, final, and so on. This field can be left blank, if not required by a system option setting.

Table 2–3 (Cont.) Markdown Page Fields

Field	Description
Value	The Value field provides the options that derive the new retail price. If a system option default has been defined, a value will be automatically added for your event. But this can be changed, if desired. Options are: ▪ **Percent Off:** A percent is defined in the change value field that subtracts from the retail price to determine the new retail. ▪ **Amount Off:** An amount is defined in the change value field that subtracts from the retail price to determine the new retail. ▪ **Fixed Price:** The item is at a specified retail that is defined in the change value field. **Note:** A rounding rule may impact entered retail. After selecting the change type, you will enter the actual value for the change. This field is required entry for every change type. The field supports up to four decimal places for Percent Off value. For Amount Off and Fixed Price decimal placement is based on currency of selected locations.
Effective Date	The date on which the markdown is set to take effect. You have the option to key in a date or select one using the calendar widget.
Rounding Rule	The Rounding Rule field provides the ability to smooth retails for an item or location. If a system option default has been defined, a value may be automatically added to your event. But, this can be changed or removed, if desired.
Reason	The Reason value defines the reason the markdown is being created. If a system option default has been defined, a value may be automatically added to your event. But, this can be changed or removed, if desired.

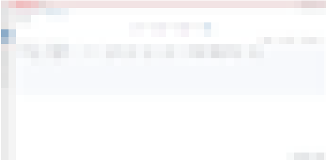
2. Once all your markdown information is entered, click **Next** The Add Markdown Summary page appears. Continue with Review, Submit and Approve.

   If you want to skip the Summary Page, you can click on **Finish** or select **Submit**, or **Approve** options from the Finish drop down menu.

Review, Submit and Approve

The Summary page displays the details of the markdown before it is added to the Clearance Group.

Figure 2–6 Add Markdown Summary Page



1. Confirm the markdown settings and click on **Finish** or select **Submit** or **Approve** from the Finish drop down menu. You are returned to the Clearance Group screen. Your new markdown events are listed in the Item Markdowns table.

Note: The Summary Page also allows individual markdowns to be removed before they are added to the Clearance Group.

Review and Resolve Conflicts

Whenever a clearance is approved, it will be subject to the conflict checking process. A clearance markdown may also be subject to conflict checking when it is submitted, depending on the system option settings. This ensures that invalid prices, or prices out of alignment with your pricing strategy, are not sent down to the selling solutions.

When a conflict occurs for a markdown you attempted to submit or approve, you will receive a notification. The notification allows you to navigate to the clearance group of the price event with the conflict. When viewing the clearance group with one or more conflicts an icon will be displayed at the clearance group, item, and markdown levels to help you see which had the issue. Clicking on the icon at any of these levels will take you to a page to view more details about the conflict. After identifying the cause of the conflict, you can make adjustments to either the current price event that you are trying to approve, or to the other event which conflicted with the current price event to resolve the conflict.

Add Additional Markdowns to an Item

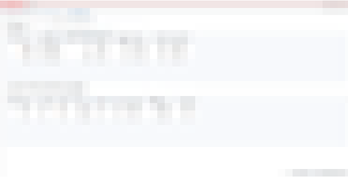
Additional markdowns for items already on markdown can be added to a clearance group through the Clearance Group page. For example, you might do this in order to add subsequent markdown to item/location combinations such that you can see each markdown level (for example, first, second, and so on) in the same group.

Perform the following procedure to add a Markdown:

1. Perform a search for the clearance group that you want to update. See Search for a Clearance Group.

2. From the search results pane, select the clearance group for which you want to add a markdown. and select **Edit** from the Actions menu. The Clearance Group page appears.

Figure 2–7 Clearance Group Page



3. From the Clearance Group page, highlight the item markdown in the Item Markdowns table to which you want to add an additional markdown and select **Add Next Markdown** from the Action menu. The Add Next Markdown pop-up appears.

Figure 2–8 Add Next Markdown Pop-Up

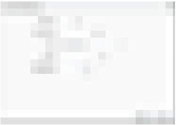


Table 2–4 Add Markdown Fields

Field	Description
Markdown	The Markdown field contains a predefined identifier for the Markdown to describe what the new markdown represents in the clearance lifecycle. For example, this could be first, second, final, and so on. This field can be left blank, if not required by a system option setting.
Effective Date	The date on which the clearance is set to take effect. You have the option to key in a date or select one using the calendar widget.

Table 2–4 (Cont.) Add Markdown Fields

Field	Description
Value	The Value field provides the options that derive the new retail price. If a system option default has been defined, a value will be automatically added for your event. But this can be changed, if desired. Options are: ▪ **Percent Off:** A percent is defined in the change value field that subtracts from the retail price to determine the new retail. ▪ **Amount Off:** An amount is defined in the change value field that subtracts from the retail price to determine the new retail. ▪ **Fixed Price:** The item is at a specified retail that is defined in the change value field. **Note:** A rounding rule may impact entered retail. After selecting the change type, you will enter the actual value for the change. This field is required entry for every change type. The field supports up to four decimal places for Percent Off value. For Amount Off and Fixed Price decimal placement is based on currency of selected locations.
Reason	The date on which the markdown is set to take effect. You have the option to key in a date or select one using the calendar widget.
Rounding Rule	The Rounding Rule field provides the ability to smooth retails for an item or location. If a system option default has been defined, a value may be automatically added to your event. But, this can be changed or removed, if desired.

4. Once values are specified, click **Apply**, **Submit**, or **Approve**. The Add Next Markdown pop-up closes and you are returned to the Clearance Group page.

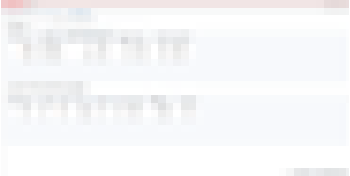
Add Additional Markdowns to a Location

Additional markdowns for locations already on markdown can be added to a location through the Clearance Group page. For example, you might do this in order to add subsequent markdown to item/location combinations such that you can see each markdown level (for example, first, second, and so on) in the same group.

Perform the following procedure to add a Markdown:

1. Perform a search for the clearance group that you want to update. See Search for a Clearance Group.
2. From the search results pane, select the clearance group for which you want to add a markdown. and select **Edit** from the Actions menu. The Clearance Group page appears.

Figure 2–9 Clearance Group Page



3. From the Clearance Group page, highlight the location markdown in the Locations for Item table to which you want to add an additional markdown and select **Add Next Markdown** from the Action menu. The Add Next Markdown pop-up appears.

Figure 2–10 Add Next Markdown Pop-Up

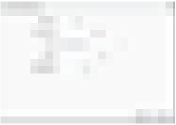


Table 2–5 Add Markdown Fields

Field	Description
Markdown	The Markdown field contains a predefined identifier for the Markdown to describe what the new markdown represents in the clearance lifecycle. For example, this could be first, second, final, and so on. This field can be left blank, if not required by a system option setting.
Effective Date	The date on which the clearance is set to take effect. You have the option to key in a date or select one using the calendar widget.

Table 2–5 (Cont.) Add Markdown Fields

Field	Description
Value	The Value field provides the options that derive the new retail price. If a system option default has been defined, a value will be automatically added for your event. But this can be changed, if desired. Options are: ■ **Percent Off:** A percent is defined in the change value field that subtracts from the retail price to determine the new retail. ■ **Amount Off:** An amount is defined in the change value field that subtracts from the retail price to determine the new retail. ■ **Fixed Price:** The item is at a specified retail that is defined in the change value field. **Note:** A rounding rule may impact entered retail. After selecting the change type, you will enter the actual value for the change. This field is required entry for every change type. The field supports up to four decimal places for Percent Off value. For Amount Off and Fixed Price decimal placement is based on currency of selected locations.
Reason	The date on which the markdown is set to take effect. You have the option to key in a date or select one using the calendar widget.
Rounding Rule	The Rounding Rule field provides the ability to smooth retails for an item or location. If a system option default has been defined, a value may be automatically added to your event. But, this can be changed or removed, if desired.

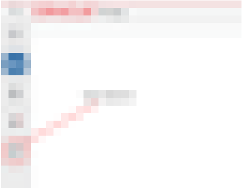
4. Once values are specified, click **Apply**, **Submit**, or **Approve**. The Add Next Markdown pop-up closes and you are returned to the Clearance Group page.

Use Quick Create

Quick Create provides an alternative method for creating a markdown. It is best suited for small sets of items and locations - such as a single item in one or two zones. Perform the following procedure to create a clearance using this function.

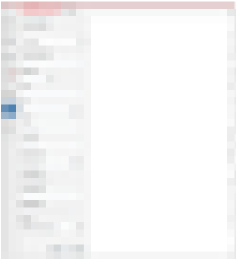
1. From the Pricing Tasks list, click the Quick Create icon.

Figure 2–11 Quick Create Icon



The Quick Create pane appears.

Figure 2–12 Quick Create Pane



2. From the Quick Create pane, select **Clearance** from the Quick Create drop down list.
3. Enter information for the following fields:

Note: Fields marked with an Asterisk are required. Fields marked with a double asterisk means that one of the fields needs to be entered.

Table 2–6 Clearance Quick Create Fields

Field	Description
Group Description	This field allows for entry of a description that will be used to create a new clearance group.
Markdown	The Markdown field contains a predefined identifier for the Markdown to describe what the new markdown represents in the clearance lifecycle. For example, this could be first, second, final, and so on. This field can be left blank, if not required by a system option setting.
Item	The Item field is active if you select Item in the Add Items by field. Click the magnifying glass to search for an item to add to the markdown.
Diff	The Diff field allows for entry or selection of a single Diff Value. You have the option to use the list of values to search on Diff Type to find the Diff value.
Zone	The Zone field allows for entry of a zone within a single zone group. You may enter a single zone or multiple zones. If multiple zones are entered a semicolon is used to separate values. **Note:** Either a Zone(s) or Location(s) must be entered, but not both.
Location	The Location field allows for entry of a location. You may enter a single location or multiple locations. If multiple locations are entered a semicolon is used to separate values. **Note:** Either a Zone(s) or Location(s) must be entered, but not both.
Effective Date	The date on which the clearance is set to take effect. You have the option to key in a date or select one using the calendar widget.
Change Type	The Change Type field provides the options that will derive the new retail price. There is a system option default that may display for the Change Type if it exists. The default value can be overridden. Change Type options are: ▪ **Percent Off:** A percent is defined in the change value field that subtracts from the retail price to determine the new retail. ▪ **Amount Off:** An amount is defined in the change value field that subtracts from the retail price to determine the new retail. ▪ **Fixed Price:** The item is at a specified retail that is defined in the change value field. **Note:** A rounding rule may impact entered retail.
Change Value	The Change Value field contains the change by percent, change by amount, or fixed price value depending on the change type selected.

Table 2–6 (Cont.) Clearance Quick Create Fields

Field	Description
Rounding Rule	The Rounding Rule field provides the ability to smooth retails for an item or location. If a system option default has been defined, a value may be automatically added to your event. But, this can be changed or removed, if desired.
Reason	The Reason value defines the reason the markdown is being created. If a system option default has been defined, a value may be automatically added to your event. But, this can be changed or removed, if desired.

4. Once you have entered all information for the newly created price change record, click **Apply**, **Submit**, or **Approve**. The new clearance is created.

   If you select Apply, the Clearance Group will be opened so that you can review and approve the event from that page. Otherwise, the event is created and subjected to submit and approval validations in the background.

3

Reset an Item on Clearance

A clearance reset ends the clearance for a set of items at a set of locations which are presently on clearance. A clearance with a change type of Reset (also known as a clearance reset or a reset) ends the clearance on the user-defined effective date. The clearance reset is displayed in the Item Markdowns and Locations tables like any other clearance records.

- Add a Clearance Reset using the Reset Wizard
- Reset an Item in an Existing Clearance Group

Add a Clearance Reset using the Reset Wizard

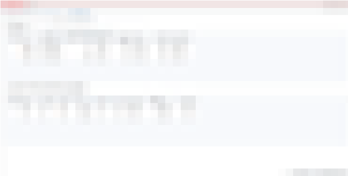
Clearance resets can be added to a new clearance group or an existing clearance group. Creating a new clearance group can be done by selecting the Create Clearance Group task from the Task List, or selecting the Create action from the Clearance Group Search screen. Either of these steps create a new Clearance Group into which resets can be added by following the steps below (starting with step 3).

Adding a reset is performed using the Reset Wizard. There are four potential stops within the wizard:

- Items
- Locations
- Reset
- Summary

1. To add resets to an existing Clearance group, perform a search for the clearance group that you want to edit. See Search for a Clearance Group.
2. From the search results pane of the Clearance Group Search page, highlight the clearance group to which you want to add a clearance reset and select **Edit** from the Actions menu. The Clearance Group page appears.

Figure 3–1 Clearance Group

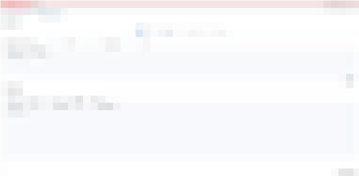


3. From the Item Markdowns table, select **Add Reset** from the Actions menu. The Add Resets Wizard launches. Continue with the Items.

Items

The initial page in the Reset Wizard allows you to select the items that you want to add to the reset.

Figure 3–2 Add Resets Items



1. From the Add Resets Items page, enter the items to add to the new reset using the following criteria:

Table 3–1 Items Page Fields

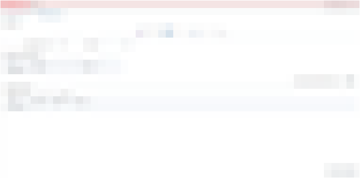
Field	Description
Add Items by	The Add Items by field allows you to select a category by which you can narrow the list of things to add to the reset. Options are: ▪ Item ▪ Parent/Diff ▪ Upload List ▪ Item List
Item	The Item field is active if you select Item in the Add Items by field. Click the magnifying glass to search for an item to add to the reset.
Parent/Diff	When Parent/Diff is selected for 'Add Items by' the display of the screen changes, showing an item field and diff type field as the top row, with a Diffs table directly below. Entering an Item and Diff type will populate the diff table where diffs can then be selected. Combinations of the entered parent item and the selected diffs are added to the Selected Items table when the apply button is selected.
Diff Type	The Diff Type field is active if you select Parent/Diff in the Add Items by field.
Item List	The Item List field is active if you select Item List in the Add Items by field. Click the dropdown to select a defined list of items to add to the reset.
Source File	Source File is active if you select Upload List in the Add Items by field. Click **Browse** to select the file to upload.

2. Once you have entered your criteria, click **Apply** to move entered or selected data for the item selection option to the Selected Items table. In the case of an Item List or Upload List, the items in the list are populated into the Selected Items table. Once all your items are added to the reset, click **Next**. The Add Reset Locations page appears. Continue with Locations.

Locations

The Locations page of the Reset Wizard allows you to define the locations associated with the reset.

Figure 3–3 Add Resets Locations



1. From the Add Resets Location page, select the location type you want to use for adding locations using the following criteria:

Table 3–2 Locations Page Fields

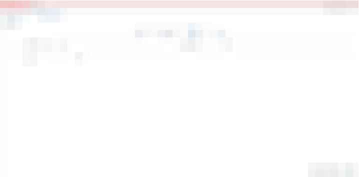
Field	Description
Add Locations by	The Add Locations by field allows you to select a category by which you can narrow the list of locations to add to the reset. Options are: ■ Zone ■ Location List ■ Store ■ Warehouse **Note:** The Warehouse option is only displayed if the Recognize Warehouses as Locations option is set to Yes.
Zone Group	The Zone Group field is active if you select Zone in the Add Locations by field.
Zone Table	The Zone Table is active if you select Zone in the Add Locations by field. When a zone group is entered, the Zone Table will be populated with the zones in the zone group.
Apply Locations within Selected Zones	The Apply Locations within Selected Zones check box is active if you select Zone in the Add Locations by field. This checkbox allows exploding the zone into stores and warehouses for populating the Selected Locations table. If you have access to one location in a zone, you can create events for the entire zone and reset can be created for all locations under the zone after exploding the zone.
Location List	The Location List dropdown list is active if you select Location List in the Add Locations by field. Click the dropdown to select from a defined list of locations to add to the reset.
Store	The Store dropdown list is active if you select Store in the Add Locations by field. Click the dropdown to select from a defined list of stores to add to the reset.
Warehouse	The Warehouse dropdown list is active if you select Warehouse in the Add Locations by field. Click the dropdown to select from a defined list of warehouses to add to the reset.

2. From the search results pane, select the location(s) to add to the reset and click **Apply**.
3. Once all your locations are added to the reset, click **Next**. The Add Reset page appears. Continue with Reset.

Reset

The Reset page of the Reset Wizard allows you to define the reset itself.

Figure 3–4 Add Reset



1. From the Resets page, define the information for the reset(s) being added using the following criteria:

Table 3–3 Reset Page Fields

Field	**Description**
Markdown	If the Markdown Value for Resets system option is defined, this field is populated and the field is disabled. If the system option is not configured, then this field is enabled. This field can be left blank.
Effective Date	The date on which the reset is set to take effect. You have the option to key in a date or select one using the calendar widget.
Reason	The Reason value defines the reason the reset is being created. You have the option to update this field or remove the value in this field.

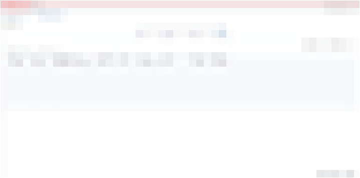
2. Once all your markdown information is entered, click **Next** The Add Resets Summary page appears. Continue with Summary.

   If you want to skip the Summary Page, you can double click on **Finish** or select **Submit**, or **Approve** options from the Finish drop down menu.

Summary

The Summary page displays the details of the reset before it is added to the Clearance Group.

Figure 3–5 Add Reset Summary



1. Confirm the reset details and click on **Finish** or select **Submit** or **Approve** from the Finish drop down menu. You are returned to the Clearance Group screen. Your new reset is listed in the Item Markdowns table.

> **Note:** The Summary Page allows individual resets to be removed before they are added to the Clearance Group.

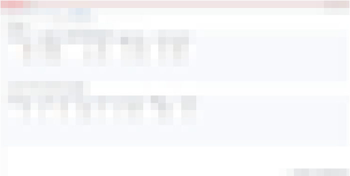
Reset an Item in an Existing Clearance Group

Another way to add a reset is to highlight an existing markdown for the item/zone that you wish to add a reset for and select the Reset Item option.

Perform the following procedure to reset an item in an existing clearance group:

1. Perform a search for the clearance group that you want to update. See Search for a Clearance Group.
2. From the search results pane, select the clearance group for which you want to add a clearance reset. and select **Edit** from the Actions menu. The Clearance Group page appears.

Figure 3–6 Clearance Group



3. From the Clearance Group page, highlight the item markdown or location to which you want to add a clearance reset and select **Reset Item** from the Action menu. The Add Reset pop-up appears.

Figure 3–7 Add Reset Pop-Up

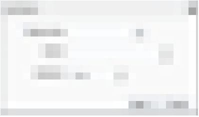


Table 3–4 Add Reset Fields

Field	Description
Effective Date	The date on which the clearance reset is set to take effect. You have the option to key in a date or select one using the calendar widget.
Reason	The Reason value defines the reason the clearance reset is being created. This field is optional.
Markdown	The Markdown field defaults the reset markdown value as defined in system options for the reset, but you can update, if desired.

4. Once updates are complete on the Add Reset pop-up, click **OK**. The Add Reset pop-up closes and you are returned to the Clearance Group tab.

4

Manage Clearance Markdowns and Resets

The Clearance Group page allows you to maintain markdowns within a clearance group. Each markdown will contain items selected for the markdown along with the locations where the markdown should be executed.

The Clearance Group screen has three modes; Add, Edit and View. If you enter this screen in View mode, all maintenance options are disabled and the Save, Save and Close, and Cancel buttons are replaced with Done. If you enter in Edit mode the following maintenance options are supported:

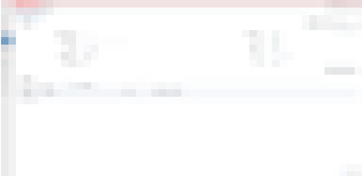
- Search for a Clearance Group
- Create a Clearance Markdown
- Modify a Markdown or Reset
- Delete a Markdown or Reset
- Update Clearance Status for one or more Clearances

Search for a Clearance Group

Perform the following procedure to search for an existing clearance group.

1. From the Tasks menu, select Manage Clearance Groups under Clearances. The Clearance Group Search page appears.

Figure 4–1 Clearance Group Search



2. Enter your clearance search criteria using the following fields:

> **Note:** In order to conduct a clearance search, you must enter at least one of the following; Department, Clearance Group, Description, or Item.

Table 4–1 Clearance Search Fields

Field	Description
Clearance Group	The Clearance Group field allows you to enter a group ID to be used in search criteria.
Description	The Description field allows you to enter a partial description to be used in search criteria.
Status	The Status field allows you to select a status to be used in search criteria. Values for the drop down include: Worksheet, Submitted, Approved, Rejected, Executed, and Processing.
Effective Date	The Effective Date field allows you to enter or select an effective date to be used in search criteria.
Conflicts	The Conflicts field allows you to select one of the following values; Yes, No or NULL (Blank) to be used in search criteria.
Department	The Department field allows you to enter or select a department to be used in search criteria. The department list of values queries all departments.
Class	The Class field allows you to enter or select a class to be used in search criteria. The class list of values queries all classes or all classes for the entered Department.
Subclass	The Subclass field allows you to enter or select a Subclass to be used in search criteria. The subclass list of values queries all subclasses or all subclasses for the entered class.
Item	The Item field allows you to enter or select an item(s) to be used in search criteria. You have the option to go directly to the search icon to look up items.
Diff	The Diff field allows you to enter or select a diff value to be used in search criteria. The diff list of values includes both diff type and diff value.

3. Once your search criteria are entered, click **Search**. The search results are displayed in the Results pane.

Modify a Markdown or Reset

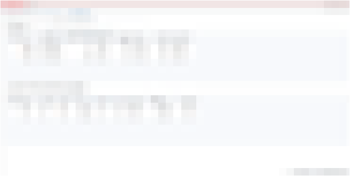
Editing clearances can be performed on events in multiple statuses with the following conditions:

- If the Effective Date is in the past, no changes are allowed unless the status of the Clearance is Worksheet, then you have the option to update the Effective Date.
- If the date that the update is being performed falls within the Effective Date minus the Price Event Processing Days, updates are only allowed for you with emergency security privileges.

To edit a markdown, follow these steps:

1. Perform a search for the clearance group that you want to edit. See Search for a Clearance Group.
2. From the search results pane of Clearance Group Search, highlight the clearance group you want to edit and select **Edit** from the Actions menu. The Clearance Group page appears.

Figure 4–2 Clearance Group



3. From the Clearance Group page, you can select either item markdowns or locations to edit. Highlight the item markdown or location you want to edit (locations shown are associated with the row in the item markdown table which has focus) and select **Edit** from that table's Action menu. The Edit Clearances pop-up appears. If you wish to modify multiple rows, click on each row to be updated while holding down the Ctrl or Shift button to multi-select.

Figure 4–3 Edit Clearances Pop-Up for a Single Row

Figure 4–4 Edit Clearances Pop-Up for Multiple Rows

> **Note:** If more than one row is selected for update, then check boxes for clearing the markdown, reason code and rounding rules will appear. Selecting these options will remove the appropriate attribute from the selected events.

4. From the Edit Clearances pop-up, use the following fields to edit the clearance details:

> **Note:** When multiple clearances are selected for editing, fields in the popup may show up as empty. This indicates that the value may vary across the selected clearances. Entering a value and updating will update all the rows, leaving the value empty will leave the values unchanged on the individual clearances.

Table 4–2 Edit Clearances Fields

Field	Description
Markdown	The Markdown field contains the markdown identifier for the selected event.
Effective Date	The date on which the clearance is set to take effect. You have the option to key in a date or select one using the calendar widget.

Table 4–2 (Cont.) Edit Clearances Fields

Field	Description
Value	The Value field provides the options that derive the new retail price. You have the option to modify the Change Type value. Change Type options: ■ **Percent Off:** A percent is defined in the change value field that subtracts from the retail price to determine the new retail. ■ **Amount Off:** An amount is defined in the change value field that subtracts from the retail price to determine the new retail. ■ **Fixed Price:** The item is at a specified retail that is defined in the change value field (rounding rule may impact entered retail). After selecting the change type, you will enter the actual value for the change. This field is required entry if a change type is selected. The field supports up to four decimal places for Percent Off value. For Amount Off and Fixed Price decimal placement is based on currency of selected locations.
Reason	The Reason value defines the reason the clearance is being created.
Rounding Rule	The Rounding Rule field provides the ability to smooth retails for an item or location.
Clear Reasons	The Clear Reasons checkbox displays next to the Reasons field when multiple items or locations are selected for edit. If you choose to remove a Reason code for the select clearances the Clear Reasons checkbox can be clicked and the reason will be removed from the selected events.
Clear Rounding Rules	The Clear Rounding Rules checkbox displays when multiple items or locations are selected for edit. When the Clear Rounding Rules checkbox is clicked the value for the rounding rule is removed from the selected events.
Clear Markdown	The Clear Markdown checkbox displays when multiple items or locations are selected for edit. When the Clear Markdown checkbox is clicked the value for the Markdown field is removed from the selected events.

5. Once updates are complete on the Edit Clearances pop-up, click **OK**. The Edit Clearances pop-up closes and you are returned to the Clearance Group page.

Delete a Markdown or Reset

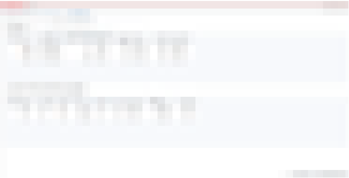
You will have options to delete markdowns and resets at the item or location level. Multiple items or locations can be selected in the respective tables, as well, to delete multiple rows at a time.

- Item Markdown Level: Highlight one or more rows on the Item Markdowns table and click Delete.
- Location Level: Highlight a single row on the Item Markdowns table and then highlight one or many rows on the Locations table and click Delete.

1. Perform a search for the clearance group that you want to delete. See Search for a Clearance Group.

2. From the search results pane, select the Clearance Group from which you want to delete markdowns or resets and select **Edit** from the Actions menu. The Clearance page appears.

Figure 4–5 Clearance Group



3. From the Clearance Group page, you can select one or more items or locations to delete. Highlight the items or locations you want to delete and select **Delete** from that table's Action menu. The Delete Confirmation message appears.

Figure 4–6 Delete Confirmation Dialog

4. Click **OK** to confirm the deletion. You are returned to the Clearance Group page.

Update Clearance Status for one or more Clearances

The status of clearance events can be updated at the group level, the item markdown level, or the item markdown/location level.

- Update Clearance Status from Group Level
- Update Clearance Status from Item Markdown Level
- Update Clearance Status from Location Level

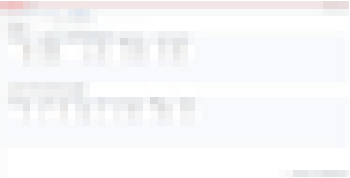
Update Clearance Status from Group Level

Perform the following procedure to update the clearance status for all events in the clearance group:

1. Perform a search for the clearance group that you want to update. See Search for a Clearance Group.

2. From the search results pane, select the clearance group for which you want to update status. and select **Edit** from the Actions menu. The Clearance Group page appears.

Figure 4–7 Clearance Group



3. Use the dropdown button at the bottom of the page to update the price change group status. Options are:
   - Submit All
   - Approve All
   - Worksheet All
   - Reject All
4. After selecting the status change, click **Save** to save the updated status and remain on the Clearance Group tab. Click **Save and Close** to save the updated status and return to the Clearance Group Search tab.

> **Note:** Depending on the status selected, the event may move to a Pending or Processing status prior to moving to its new status while conflicts are being checked. To see the updated status after conflict checking completes, close the page and re-open.

Update Clearance Status from Item Markdown Level

Perform the following procedure to update the clearance status on item markdowns for all the locations:

1. Perform a search for the clearance group that you want to update. See Search for a Clearance Group.
2. From the search results pane, select the clearance group for which you want to update status. and select **Edit** from the Actions menu. The Clearance Group page appears.
3. From the Clearance Group tab, from the Item Markdowns table, highlight the records for which you want to update status.

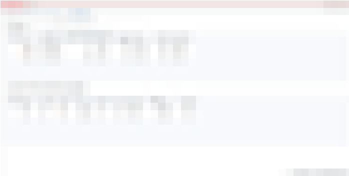
4. With the records highlighted, select the desired status update from the Actions menu.
5. After selecting the status change, click **Save** to save the updated status and remain on the Clearance Group tab. Click **Save and Close** to save the updated status and return to the Clearance Group Search tab.

Update Clearance Status from Location Level

Perform the following procedure to update the clearance status on item markdowns at the location level:

1. Perform a search for the clearance group that you want to update. See Search for a Clearance Group.
2. From the search results pane, select the clearance group for which you want to update status. and select **Edit** from the Actions menu. The Clearance Group page appears.

Figure 4–8 Clearance Group Tab



3. From the Clearance Group page, from the Items Markdown table, highlight the item markdown for which you want to update status.
4. In the Locations table, highlight the location(s) for which you want to update status for one or more locations.
5. With the location highlighted, select the desired status update from the Actions menu.
6. After selecting the status change, click **Save** to save the updated status and remain on the Price Change Group page. Click **Save and Close** to save the updated status and return to the Clearance Group Search page.

Note: If a clearance is selected for a status change and the new status is not valid, the clearance will be ignored and will not be updated.

5

Upload/Download from Spreadsheet

Pricing supports downloading of clearance groups into a spreadsheet to allow you to perform mass maintenance on the data. This data can then be re-uploaded into Pricing to update the events. Additionally, the upload function provides the ability to create new events from a spreadsheet and have them added to an existing group or create a new group. This chapter summarizes the workflow for both download and upload of clearance groups.

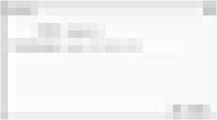
- Download Clearances
- Upload from a Spreadsheet
- View Issues

Download Clearances

Perform the following procedure to download clearances to a spreadsheet:

1. Perform a search for the clearance group(s) that you want to update. See Search for a Clearance Group for more information.
2. From the search results pane, select the clearance groups you wish to download.
3. Select the **Download Selected** option from the Action Menu.
4. In the Download pop-up, select the template to use for downloading the clearance groups. This will automatically generate a process description for the download, which you can update if desired.

Figure 5–1 Download Pop-Up



5. Click **OK**.

6. When prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice.

Upload from a Spreadsheet

The Upload Clearances page provides the ability to upload clearances from a spreadsheet (.ods file) into Pricing.

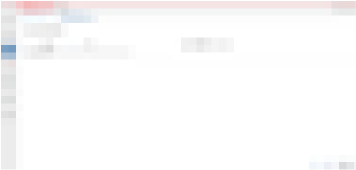
All uploads are done using templates. You can use the default Clearance template or configure a template for use in your business such that certain fields are defaulted or hidden from users to streamline the uploading process. You can download a blank version of your template by selecting the **Download Blank Template** option under Data Loading in the task list. For more information on blank templates, see the *Pricing Do the Basics User Guide*.

> **Note:** See the *Oracle Retail Merchandising Do the Basics User Guide* for information about template configuration.

Perform the following procedure to upload clearances via spreadsheet:

1. From the Tasks menu, select **Upload Clearances** under Clearances. The Upload Clearances page opens.

Figure 5–2 Upload Clearances



2. In the **Template** field, select the template you are using.
3. The **Process Description** will default based on the template name and timestamp, but can be updated.
4. In the **Source** field, click the **Browse** button to locate the spreadsheet file (.ods file) you want to upload and click **Open**.
5. Select one of the following options:
   - Click **Upload** to upload the file.
   - Click **Revert** to clear out the screen inputs.
6. Click **Done** to close the Upload Clearances window.

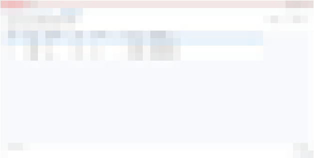
Note: If any errors occur during the upload, you will receive a notification. Similarly, if the upload involves any status changes or new events created in submitted or approved status, you may receive a notification if the uploaded event conflicts with another event. If there are no issues with the new event, you will not receive a notification. For more information on data loading statuses, see the View Data Loading Status section in the *Pricing Do the Basics User Guide*.

View Issues

If you receive a notification about an error that occurred in the uploading of a Clearance, you can click on the link in the notification, which will take you to the Data Loading Status page 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.

Figure 5–3 Clearance Issues Page



The details provided include the worksheet in which the error is encountered, the row and column in the spreadsheet that is in error, and the error description. Errors will need to be fixed in order to successfully create or update a clearance.

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. Once the errors have been corrected, the data can be re-uploaded into Pricing as needed, using the corrected file.