Oracle® Retail Pricing Cloud Service

Foundation Data User Guide

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Oracle Retail Pricing Cloud Service Foundation Data User Guide, Release 19.1.000

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Preface

This document describes the Oracle Retail Pricing 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 Pricing 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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An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

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

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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

Configure Zones

The zone structure in Pricing Cloud Service allows you to define groupings of locations for pricing purposes and eliminates the need to manage pricing at the, more granular, location level. At the highest level, these groupings are divided into categories called zone groups. Zone groups are used in regular, clearance and promotional pricing. You can determine how zone groups are created for your business based on a number of different factors, the type of pricing event, regular and/or clearance, or the items being priced, such as by department or division.

Within zone groups are groupings of locations (stores or warehouses) called zones. The function of these zones is to group locations together in a manner that best facilitates company pricing strategies. For example, you might choose to create a zone group based on geographic region such as the North America. Then, within the North America Zone Group, you could have regional zones, such as:

- US East region
- US West region
- Mexico stores

Similarly, you can create a zone group based on customer characteristics. Then, within the zone group create zones with similar geographical or customer characteristics, such as

- US urban stores
- US rural stores

There are no restrictions on the number of locations a zone can contain and a location can (and likely will) exist in multiple zone groups. For example, a New York City store might exist in the US urban stores zone as well as the US East region zone, which is part of the North American Zone Group. However, two rules apply to the relationship between locations and zones:

- A location cannot exist in more than one zone within a zone group.
- All locations within the same zone must use the same currency.

Add New Stores or Warehouses

When new stores or warehouses are added in Merchandising, a pricing location is designated for the new store or virtual warehouse. Pricing Cloud Service will take this information for the new location and attempt to add the new location to every zone group/zone in which the pricing location exists across all zone groups. If the pricing location and the new location are not of the same currency, then the new location will be added to every zone group where the pricing location exists, and the system will

create a new zone for the location with the currency of the new location. This process applies for all store types, including company and customer (franchise, or wholesale) stores and stockholding or non-stockholding locations.

Note: Pricing of warehouses is determined by a system option in Pricing Cloud Service.

Empty Zones

You can create an empty zone and add locations to the zone at a later date. Price events can also be created against a zone with no locations, based on a system option setting; however, conflict checking will not run and future price detail is not created for these zones. Once locations have been added to those zones, any new item/location relationships created will be added to price events created for those zones.

Zone Maintenance

When a location is added to an existing zone, the location will participate in any price events which are approved in the future, but it will not inherit any existing approved events. When a location is removed from a zone, it will stay on any existing approved events, but will not be included in any new events created for that zone. If a location needs to be added to or removed from an existing event, setting the event back to worksheet and then re-approving will add that location.

Initial Price Zone Definition

Once zone groups are created in Pricing Cloud Service, you are able to assign them to Initial Price Zone Definitions. This allows you to specify the zone structure that is used when pricing new items added in a particular department, class, or subclass, including markup percentage, and markup type (cost or retail), and rounding rules.

Note: Markup is also defined as part of the department creation process, but Pricing Cloud Service uses the Initial Zone Definition to determine initial price markup.

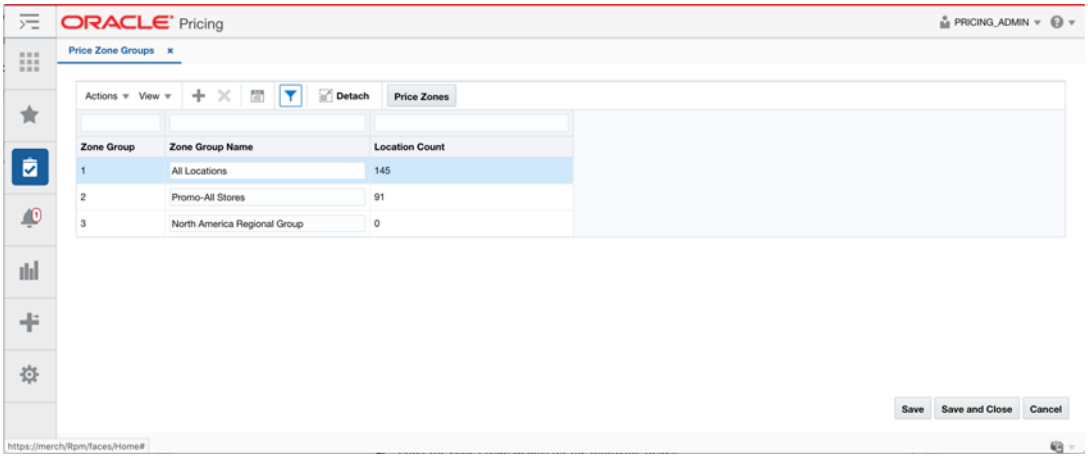
Create Price Zone Groups

A Zone Group identifies a particular way of grouping locations for pricing purposes.

Perform the following procedure to create a price zone group:

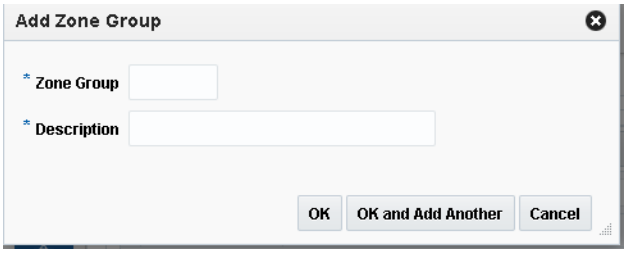
1. From the Tasks menu, select Price Zones under Foundation Data. The Price Zone Groups tab appears.

Figure 1–1 Price Zone Groups Tab



2. Select **Add Zone Group** from the Action menu. The Add Zone Group dialog appears.

Figure 1–2 Add Zone Group Dialog



3. Enter the zone group details for the following fields:
   - Zone Group – This field is a unique price zone group identifier.
   - Description – The description of the zone group.
4. Click **OK** to add the new price zone group. You are returned to the Price Zone Groups tab.

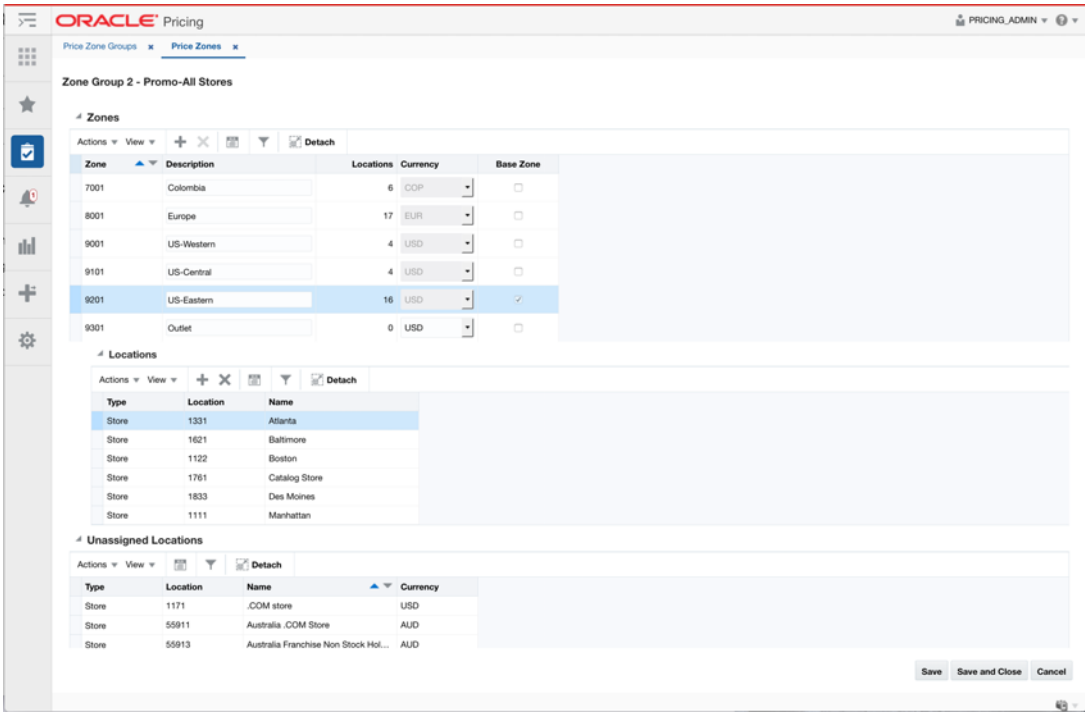
   Click **OK and Add Another** to add the current price zone group to the table and add another without leaving the Add Zone Group dialog.

Manage Zone Groups

Perform the following procedure to edit a price zone group:

1. From the Tasks menu, select Price Zones under Foundation Data. The Price Zone Groups tab appears.
2. From the Zone Group table, highlight the zone group you want to edit and select Price Zones from the Actions menu. Alternatively, highlight the zone group and click the Price Zones button. The Price Zones tab appears.

Figure 1–3 Price Zones Tab

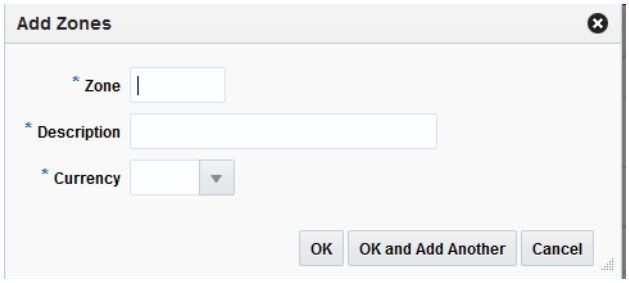


3. From the Zones tab, you can perform the following actions:
   - Add Zones
   - Delete Zones
   - Add Locations
   - Delete Locations

Add Zones

1. From the Zones table, select **Add Zone** from the Actions menu. The Add Zones dialog appears.

Figure 1–4 Add Zones Dialog



2. In the Zones field, enter a unique price zone identifier.
3. In the Description field, enter a description for the zone.
4. In the Currency field, select the currency for the price zone from the drop-down list.

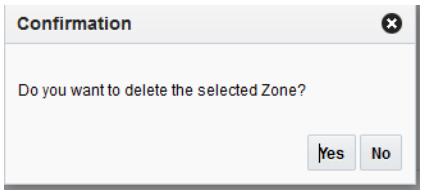
5. Click **OK** to add the new zone. You are returned to the Zones tab.

   Click **OK and Add Another** to add the current zone to the table and add another without leaving the Add Zones dialog.

Delete Zones

1. From the Zones table, highlight the zone you want to delete and select **Delete** from the Action menu. The delete zone confirmation dialog appears.

Figure 1–5 Delete Zone Confirmation Dialog



2. Click **Yes** to confirm the deletion. You are returned to the Zones tab.

Add Locations

The Add Locations dialog allows users to assign locations to an existing zone.

Note: If a location is already in the Locations table, it will not be added a second time.

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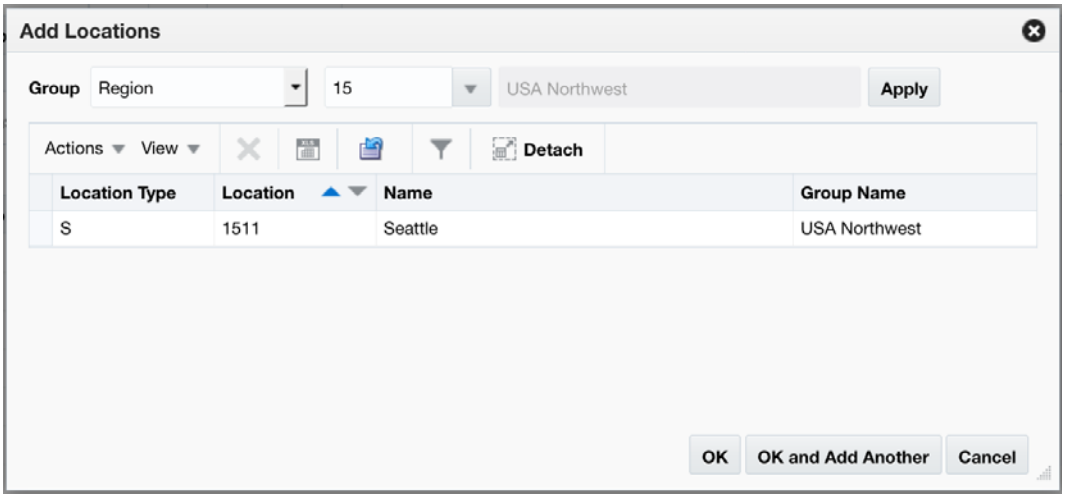
1. From the Locations table, select **Add Locations** from the Actions menu. The Add Locations dialog appears.

Figure 1–6 Add Locations Dialog



2. From the Group field, select the group type for the location. Options are:
   - Location List
   - Chain

- Area
- Region
- District
- Store
- Warehouse

Note: Warehouse is only shown as an option for group type if the Recognize Warehouses as Locations system option is enabled.

- Unassigned Locations

3. Once a Group is selected, select or enter a Group Value.
4. Click **Apply** to add the new location to the Location table.
5. When all locations are added, click **OK** to add the new locations. You are returned to the Zones tab.

   Click **OK and Add Another** to add the current location to the table and add another without leaving the Add Locations dialog.

Delete Locations

The Delete function allows a location to be removed from a zone.

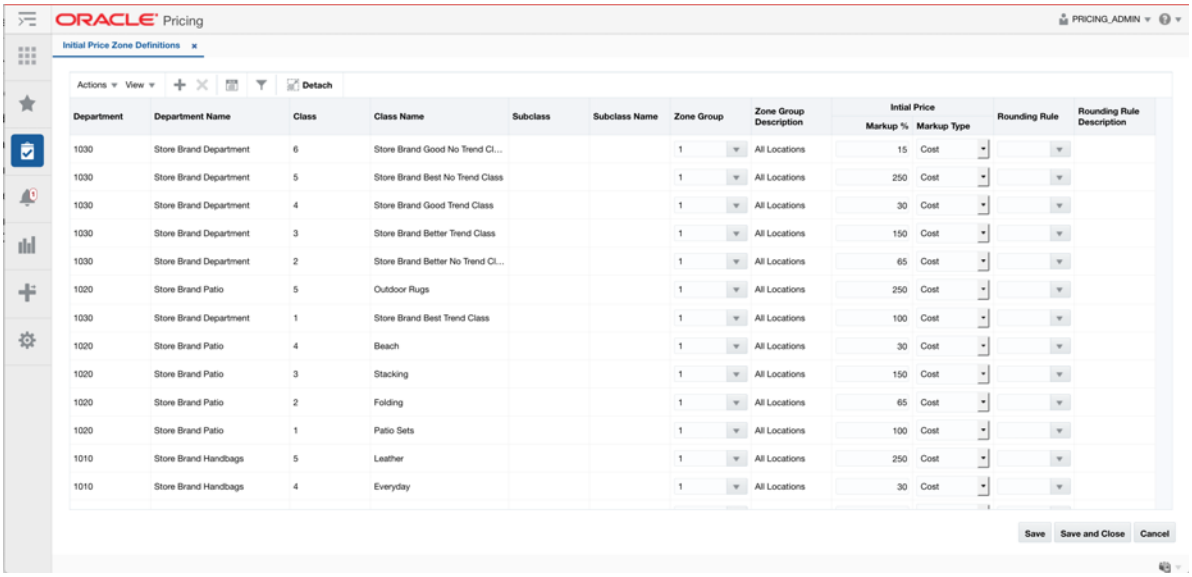
1. From the Zones table, highlight the zone you want to delete and select **Delete** from the Action menu. The delete location confirmation dialog appears.
2. Click **Yes** to confirm the deletion. You are returned to the Zones tab.

Assign to Hierarchies

Perform the following procedure to set up initial price zone definitions:

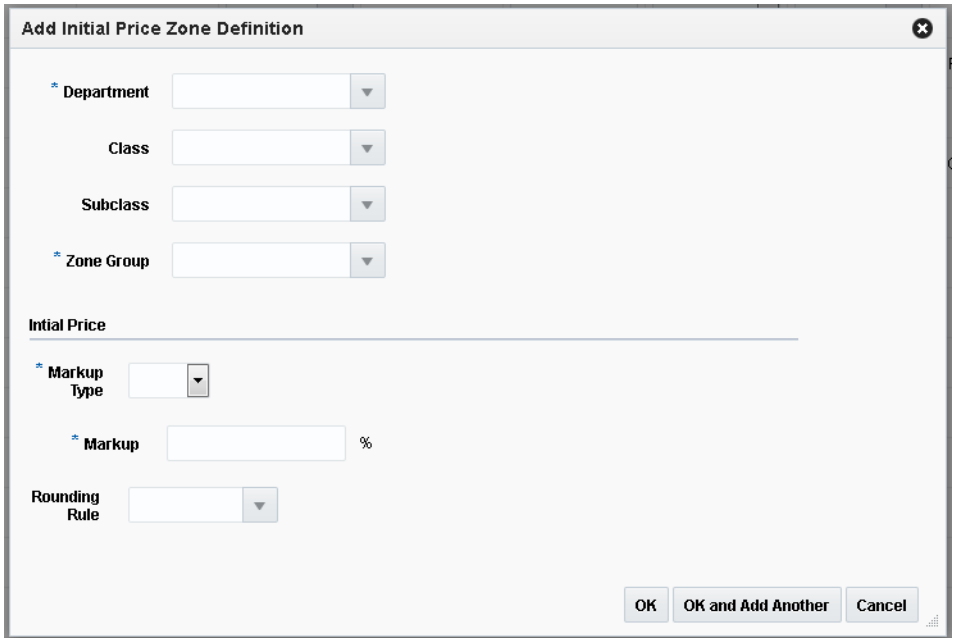
1. From the Tasks menu, select Initial Price Zone Definitions under Foundation Data. The Initial Price Zone Definitions tab appears.

Figure 1–7 Initial Price Zone Definitions Tab



2. Select **Add** from the Action menu. The Add Initial Price Zone Definition dialog appears.

Figure 1–8 Add Initial Price Zone Definition Dialog



3. Enter the initial price zone definition details for the following fields:
   - Department – Enter or select a single department.

Note: The Department, Class, and Subclass fields have a cascading relationship. You can enter or select values for the three fields in any order but the values will vary depending on selections.

- Class – Enter or select a single class.
- Subclass – Enter or select a single subclass.
- Zone Group – The Zone Group specified here is used as the structure for the initial price setting for new items added to the defined level of the Merchandise Hierarchy.
- Markup Type – The value entered in this field determines how markup is calculated for items existing in the defined hierarchy.
- Markup – This percentage field is used to calculate the initial retail based on the item's cost.
- Rounding Rule – This field allows you to assign a rounding rule to the initial price zone definition. The rounding rule is used to adjust final price used for the initial price of new items to meet the retailer pricing strategy.

2

Use Rounding Rules

Rounding rules help you create a uniform pricing strategy. They are used to smooth proposed retails in order to maintain a consistent set of price points by applying "ends in" logic to retail values. Rounding Rules are defined globally, but can also include exceptions or exclusions based on merchandise hierarchy and/or currency. This provides a simple but flexible configuration to handle a wide variety of scenarios.

> **Note:** Editing rounding rules details will only affect retails derived by the rounding rules from that point on. It will not affect/overwrite any retails that have already been derived based on the old rounding rules.

Rounding rules are optional. If you do not use rounding rules, the following rules are enforced for "percent off" price events, based on the number of decimal places defined as part of the currency set up in Merchandising:

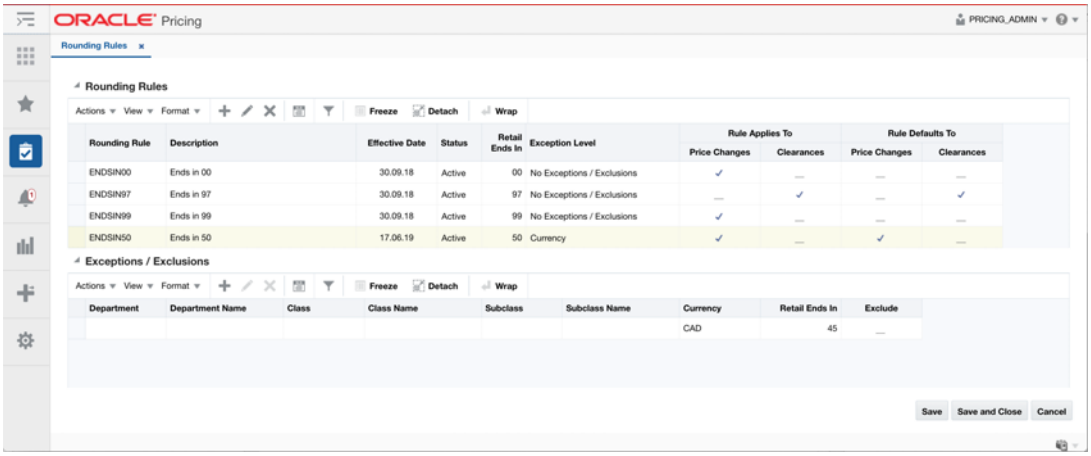
- Regular Price Changes: if the extra digit (beyond the number of digits for the currency) is between 0 and 4, round down; if it is between 5 and 9, round up.
- Clearance Events: retail will always round down

Manage Rounding Rules

Perform the following procedure to create rounding rules:

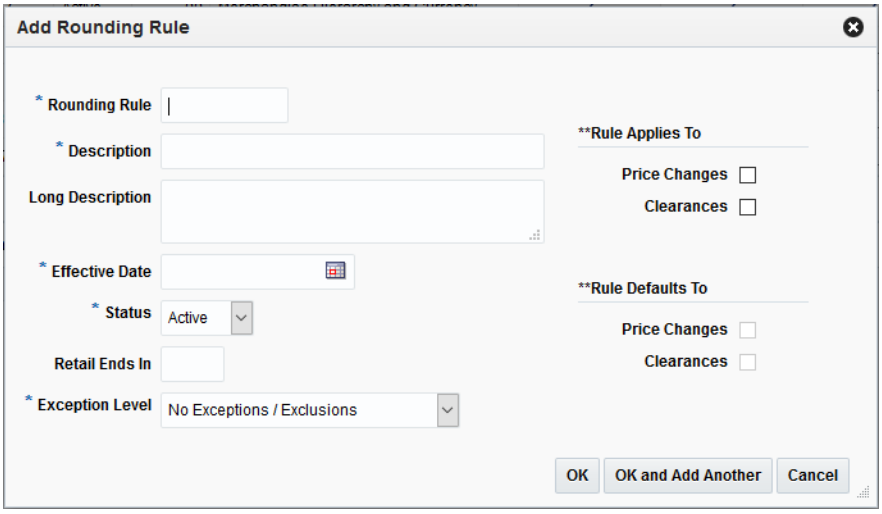
1. From the Tasks menu, select Rounding Rules under Foundation Data. The Rounding Rules tab appears.

Figure 2–1 Rounding Rules Tab



2. Select **Add** from the Action menu. The Add Rounding Rule dialog appears.

Figure 2–2 Add Rounding Rule Dialog



3. Enter the rounding rule details for the following fields:
   - Rounding Rule – The identification number of the rounding rule.
   - Description – The description of the rounding rule.
   - Effective Date – The date when the Rounding Rule will become available.
   - New Retail Ends In – Used for adjusting the decimal value. This field supports 1 to 4 positions. The Ends In value assumes to start in the right most decimal position. For example, if the Retail Ends In is 9 and the currency uses two decimal positions, the value is treated as x9.
   - Exception Level – The Exception/Exclusion Level of the rounding rule. This field allows the user to decide what type or exceptions or exclusions (if any) are allowed for the rounding rule. This value drives what fields are available in the Exceptions/Exclusions table.
   - Rule Applies To – The check boxes indicating if this rounding rule applies to Clearances or Price Changes.

- Rule Defaults To – The check boxes indicating if this rounding rule is the default for Clearances or Price Changes.

4. Click **OK** to add the new rounding rule. You are returned to the Rounding Rule tab.

   Click **OK and Add Another** to add the current rounding rule and create another.

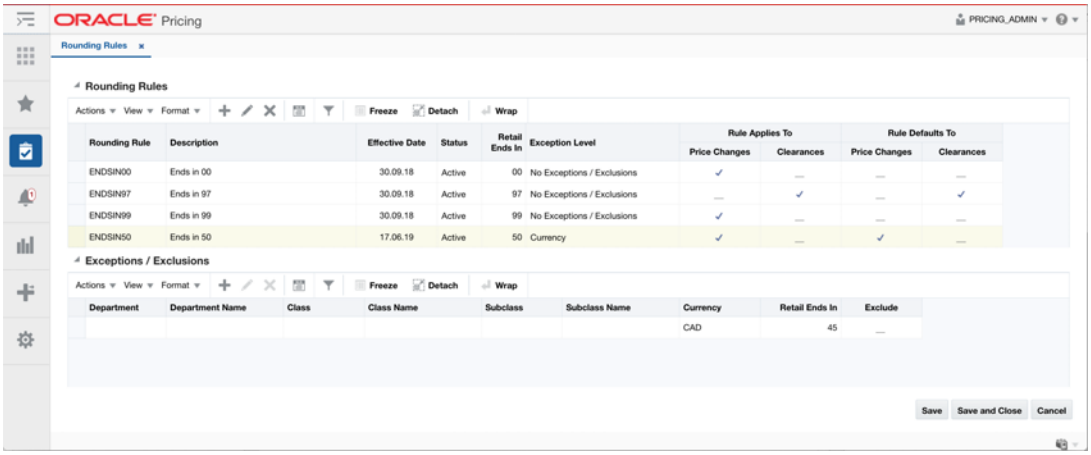
Manage Exceptions

The Exception or Exclusion table will show exceptions and exclusions related to the highlighted row in the Rounding Rules table. Actions taken in the Exception or Exclusion table are related to the highlighted rounding rule. For instance, when the Add action is taken on the Exception/Exclusion table, it means the Exception or Exclusion row being added is for the highlighted rounding rule.

Perform the following procedure to create exceptions or exclusions to rounding rules:

1. From the Tasks menu, select Rounding Rules under Foundation Data. The Rounding Rules tab appears.

Figure 2–3 Rounding Rules Tab

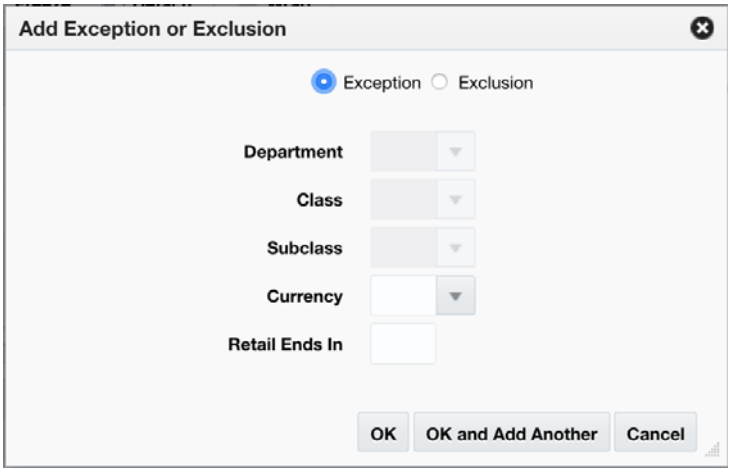


2. From the Rounding Rules table, select the rounding rule to which you want to add an exception or exclusion.

   Note: The rounding rule selected must have had the Exception Level specified when it was initially added.

3. From the Exceptions/Exclusions table, select **Add** from the Action menu. The Add Exception or Exclusion dialog appears.

Figure 2–4 Add Exception or Exclusion Dialog



Note: Fields on the Add Exceptions and Exclusions are enabled or disabled based on the 'Exception Level selected on the Rounding Rule. For instance, when Merchandise Hierarchy is specified as the exception level, the Currency field is disabled. When Currency is specified as the exception level, the Department, Class, and Subclass fields are disabled.

4. Enter the Exceptions/Exclusions details for the following fields:
   - Exclusion/Exception – The radio button for Exceptions and Exclusions defaults to Exceptions. When Exclusion is selected, the Retail Ends In field is cleared and disabled.
   - Department – The single department to use as an exception or exclusion to the rounding rule.
   - Class – The single class to use as an exception or exclusion to the rounding rule.
   - Subclass – The single subclass to use as an exception or exclusion to the rounding rule.
   - Currency – The currency to use as an exception or exclusion to the rounding rule.
   - Retail Ends In – Used for adjusting the decimal value. This field supports 1 to 4 positions. The Ends In value assumes to start in the right most decimal position. For example, if the Retail Ends In is 9 and the currency uses two decimal positions, the value is treated as x9.

   Note: This field is enabled for exceptions but disabled for exclusions.

5. Click **OK** to add the exception or exclusion. You are returned to the Rounding Rule tab.

   Click **OK and Add Another** to add the current exception or exclusion and create another.

3

Configure Price Events and Defaults

The Pricing Cloud Service module uses a number of system options to configure the functionality, which allows you to tailor the functionality for your business, including conflict checking options, defaulting commonly used values, and data retention.

System Options

All of the following system options can be viewed and edited through the Pricing Cloud Service screens.

Table 3–1 System Options

System Options	Functional Area	Description
Single UOM for All Items	Price Changes Clearance Promotion	When a value is designated for this system option, this value is used as the unit of measure (UOM) for all price events created and Pricing Cloud Service does not perform UOM validation when you create events. If a value is not selected, when you create fixed-price price changes or clearance events, either a UOM must be designated, or Pricing Cloud Service will attempt to derive one and will raise errors if it is not consistent amongst items in the event.
Price Event Processing Days	Price Changes Clearance Promotion	Number of days required between the current date and the effective date for price changes and clearance. It ensures that price events are created with enough advance timing that stores and other impacted areas can react accordingly. Security will permit certain users to create price events inside this window, including creating same day price events, sometimes called "emergency" changes. This must be set to a value greater than zero. Note: this system option does not determine the communication processes to the selling systems. Default value: 1
Offer End Date Required	Promotion	If this indicator is checked, the End Date on the Offer becomes a required field. The user must enter it before navigating to the next screen. Default value: Unchecked.

Table 3–1 (Cont.) System Options

System Options	Functional Area	Description
Reset Clearance with Price Change	Price Change Clearance	If this indicator is set, it extends the functionality of a price change event. This enables the price change event to end a clearance cycle by acting as an implied clearance reset when the price change is executed.
Regular Retail Greater than Clearance Retail	Conflict Checking	If the indicator is checked, conflict checking will raise a conflict for the event when the retail of the clearance is greater than the regular retail for the item location. If the indicator is unchecked, conflict checking will skip this rule. Default value: checked
Clearance Retail Less than Previous Markdown	Conflict Checking	If the indicator is checked, conflict checking will raise a conflict for the clearance event when the retail of the clearance is greater than the previous markdown for the item/location. If the indicator is unchecked, conflict checking will skip this rule. Default value: checked
Run for Submit	Conflict Checking	This option determines whether or not conflict checking will be performed when submitting a price event for both price changes and clearance. If this system option is checked, conflict checking process will be performed when you submit a price event. Otherwise, conflict checking will be skipped and not performed until approval. Default value: No (unchecked)
Zone/Parent Ranging	Zones	If this system option is checked, when you create a price change/clearance at a level higher than transaction item/location, there must be at least one ranged item/location combination represented. If there is not at least one, then the system will not allow you to create the event. If this system option is not checked, then ranging checks will not be performed on events created at a level higher than transaction item / location. Default value: Yes (checked)
Recognize Warehouses as Locations	Zones	This system option controls whether warehouses will exist in zone groups/zones and if price events can be created against warehouses. When the system option is checked, warehouses can be assigned to price zones and can be used in price events. When the system option is unchecked, warehouses cannot be added to zones or events. Default value: No (unchecked)

Table 3–1 (Cont.) System Options

System Options	Functional Area	Description
Price Change/Clearance Rejects	Data Retention	This field defines the number of days after the effective date of a rejected price change or clearance the event should be purged from the system. Valid values: 1- 999 Default values: 30
Clearance Groups for Download or Search Results	Search Results	This option limits the data that is displayed in the Clearance Group Search results to a manageable number to review. You can enter additional criteria to narrow down the list if the groups they are searching for is not returned in the initial search. This option is also used to limit the number of Clearance Groups to be downloaded. Valid values: 1-999 Default value: 100
Price Change Groups for Download or Search Results	Search Results	This option limits the data that is displayed in the Price Change Group Search results to a manageable number to review. You can enter additional criteria to narrow down the list if the groups they are searching for is not returned in the initial search. This option is also used to limit the number of Price Change Groups to be downloaded. Valid values: 1-999 Default value: 100

System Defaults

The following system defaults can be viewed and edited through the user interface. Also, there are separate options for price changes and clearance for each of these defaults, so that different values can be used for defaults by price event type.

Table 3–2 System Defaults

System Defaults	Functional Area	Description
Diff Type	Price Change Clearance Promotion	This defines a default value for the desired default diff type in price change and clearance events. Examples of diff types are color, size, flavor, and so on. Valid values for diff type are defined as part of Merchandising Foundation Data.
Item Level	Price Change Clearance Promotion	This defines the default item level that will be used when you create a price change or clearance. Valid values are Parent, Parent/Diff, or Transaction Item. If a value is not defined for this option, then Transaction Items will be used.

Table 3–2 (Cont.) System Defaults

System Defaults	Functional Area	Description
Change Type	Price Change Clearance Promotion	This defines a value for the change type that will be displayed when you are creating a price change or clearance. Valid values (price change): Change by Percent, Change by Amount, or Fixed Price Valid values (clearance, promotion): Percentage Off, Amount Off, or Fixed Price **Note:** For promotion, this field is called Discount Type. Default value: Change by Amount
Reason Code	Price Change Clearance	This defines a value for the default reason code in price change and clearance events. Valid values are dependent on the values setup in the Pricing Cloud Service system.

4

Configure Clearance Cadence Templates

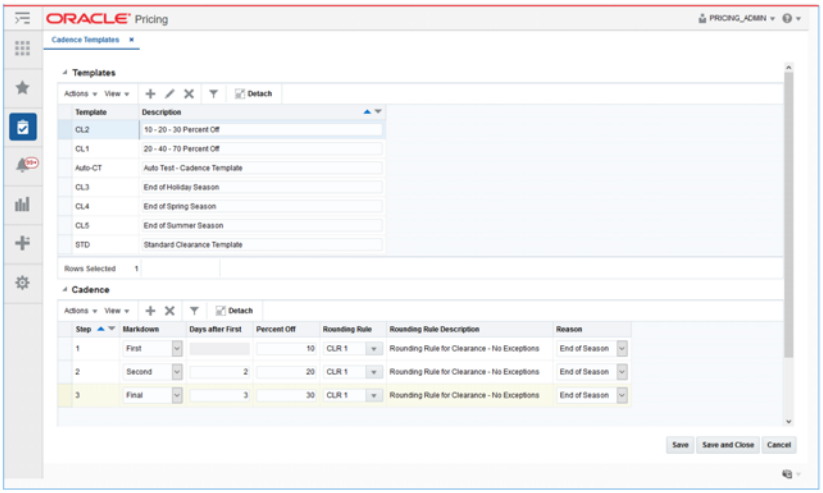
Clearance Cadence Templates allow you to create predefined templates which tie multiple markdowns together so they can be applied to and item/location quickly in a single action. When using the template, the user will pick an initial effective date for the first markdown. Subsequent markdowns will have an effective date based on the days from initial markdown. Other attributes on the markdowns generated from the template will come from the change values on the template.

Add Clearance Cadence Templates

Perform the following procedure to add a Clearance Cadence Template:

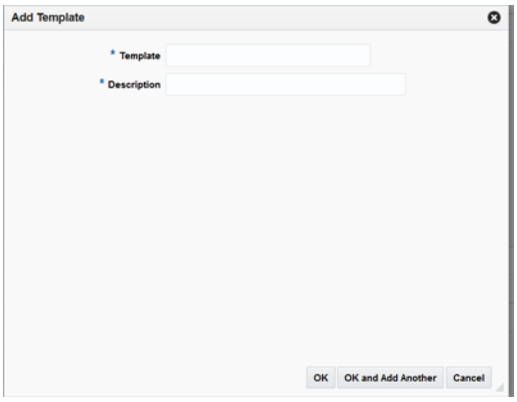
1. From the Tasks menu, select Clearance Cadence Templates under Foundation Data. The Cadence Templates tab appears.

Figure 4–1 Cadence Templates



2. Select **Add** from the Action menu. The Add Template dialog appears.

Figure 4–2 Add Template Dialog



3. Enter the template details for the following fields:
   - Template – This field is used for providing the template ID.
   - Description – The description of the cadence template.

   Note: Additional fields may be displayed based on system option settings.

4. Click **OK** to add the new template. You are returned to the Cadence Templates tab.

   Click **OK and Add Another** to add the current template to the table and add another without leaving the Add Template dialog.

Edit Clearance Cadence Templates

1. From the Tasks menu, select Clearance Cadence Templates under Foundation Data. The Cadence Templates tab appears.
2. From the Template table, highlight the template you want to edit and select Edit from the Actions menu. The Edit Template dialog appears.
3. From the Edit Template dialog, make any desired changes to the template.
4. When all edits are complete, click **OK**. You are returned to the Cadence Templates tab.

Delete Clearance Cadence Templates

1. From the Templates table, highlight the template you want to delete and select **Delete** from the Action menu. The delete template confirmation dialog appears.
2. Click **Yes** to confirm the deletion. You are returned to the Cadence Templates tab.