Oracle CX for Industries

Using Consumer Goods

April 2023

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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

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1 About This Guide

Audience and Scope

Manage your retail execution and trade promotion activities more effectively using the Consumer Goods application.

The following roles can perform various tasks in retail execution and trade promotion:

- Marketing managers
- Sales managers
- Store managers
- Sales representatives

Related Guides

Refer to the related guides listed in the following table to understand more about the business flows and functionality covered in this guide.

Table

Guide	Description
Oracle CX for Industries Using Consumer Goods Mobile	Describes how to perform tasks related to retail execution and trade promotions management using consumer goods mobile and tablet applications.
Oracle CX for Industries Integrating Retail Execution Mobile Direct-Store-Delivery	Provides information on how to integrate back-end systems such as supply chain, accounting, or order management systems with Direct-Store-Delivery processes in Consumer Goods Mobile.
Oracle CX for Industries Getting Started with Consumer Goods Implementation	Describes how to set up and configure Oracle CX for Consumer Goods while or after implementing Oracle CX Sales and Oracle B2B service. **Note:** Ensure that you perform all the steps detailed in this guide to complete the setup and configuration of the Consumer Goods application. This enables you to use the application for your day to day retail execution activities and manage trade promotions.
Oracle CX Sales Using Sales	Contains information on how you can perform your day to day sales activities using Oracle CX Sales and Oracle B2B service.
Oracle Applications Cloud Using Common Features	Contains information on how you can perform your day-to-day activities using Oracle Applications Cloud.

2 Consumer Goods Overview

Retail Execution

Let's look at how you can plan and carry out your retail store visits. You can accomplish two key components of retail execution: merchandising and direct store delivery.

Merchandising

Use the retail execution activities in consumer goods to plan and perform your retail visits for the day. Here are a few merchandising tasks you do during the retail visit. Retail execution tasks can be categorized into the following:

- Prepare for your Store Visit: Plan and schedule activities for your upcoming visits and review route and store contact information.
- Start your Appointment: At the store, perform inventory audits, review promotions, and conduct compliance surveys.
- Finish your Appointment: Before you checkout, make a note of your pending activities, settle your route, and create appointments for follow-up visits.

Direct Story Delivery

Manage shipment delivery and payment collection on orders using the direct store delivery feature. You can:

- Manage your route and route assignments, and distribution centers.
- View your route inventory and inventory reload reports.
- Manage delivery, cancellation, and return of orders.
- Collect order delivery and credit payments.
- Settle routes.

Manage Trade Promotions

Boost your sales by managing trade promotions more effectively. You can manage trade promotions in the mobile application too. You can use one of these available promotion types:

- Fixed Discount
- Fixed Combo
- Dynamic Combo
- Volume Discount

Let's understand the trade promotions workflow using an example. In this scenario, marketing managers and account managers handle the promotion, but your company may follow a different process. Suppose you're the marketing

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manager for a beverage manufacturer that has developed a new brand of fruit-flavored beverage. Here's the stepwise process example:

- You create a promotion program to launch and promote the new brand.

- Your account managers who handle large chain of grocery stores create promotions to increase sales and brand awareness.

- Your account managers review your program and modify the promoted products.

- Your sales representatives can perform the promotion task during the retail outlet visit.

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3 How to Work with Accounts

Manage Accounts

Accounts are the retail stores that you visit.

You can store information about customers, stores, businesses as accounts. Here's what you can do when you work with Accounts:

- Add information about store type, URL, primary contacts.
- Associate with cluster, price book, assortment, and segment.
- Authorize coupon payment and currency.
- Generate print templates.
- Mark certain accounts as distributors.
- Source ordered products from accounts or its distributors.

You can assign a field salesperson as the owner and views account details using the Accounts infolet to quickly see analytics. You can either create accounts or import them.

While working with a route, you can view the details of the visits for an account. You can also track your shelf stock and place orders for inventory. Each account has an associated shopping cart for adding products for that account. Lastly, account managers and sales managers can set up monthly sales targets for each account their team manages.

Create and Edit Accounts

As a sales manager or a sales administrator, you can create or edit accounts, associate price books and assortments, and enable distributor.

You can source products from an account or its distributors. Here's how you can create an account

1. Go to **Accounts > Create**.
2. Enter the details such as primary contact, URL, currency.
3. Select a price book and assortment from the available list.
4. Select the required print templates
5. Select **Segment** to manage your accounts by the segments such as an individual division or market for operational efficiency.
6. Specify a field sales representative as the owner of the account.
7. Click **Save and Close**.

To edit accounts:

1. On the springboard, click **Accounts**.
2. Click a link to edit an account and make your changes.
3. Click **Save and Close**.

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Manage Merchandising Displays

Merchandising display is a crucial activity for any retail account. Having an effective merchandising display can help a product reach its sales potential. The display items can contain store inventory and loaned items.

To create a merchandising display for an account:

1. Sign in using administrator role.
2. Navigate to the Accounts object and select the Merchandising Displays subtab from the Account Details page.

   View the list of merchandising displays, if any.
3. Select **Create** to create a merchandising display record with the required fields such as name, description, and start date.
4. Click **Save and Close**.

To add products to a merchandising display record:

1. Go to the Accounts object and select an account.
2. Select the Inventory subtab.
3. Select a product from the drop-down list.
4. Select the value from the drop-down list for the merchandising display field to associate it with a merchandising display record.

   You can also select an existing inventory record and add a merchandising display with it.
5. Click **Save and Close**.

Work with Clusters

Let's understand how you can improve operational efficiency by linking multiple accounts into clusters.

What's a Cluster?

Clusters help you organize your accounts into segments based on various attributes such as products, demographics, and more. Using clusters, you can manage your product assortment plans, business objectives, contract templates, and promotion programs efficiently.

As a Marketing Manager, you can create, publish, analyze, and revise clusters. Let's understand how clusters can help you:

- Organize the stores into various segments and categories.

- Operate with speed and efficiency at various product, customer, and location levels.

- Improve large-scale retail operations across geographies and markets.

- Plan better downstream assortment planning, business objectives, print templates, promotion programs, and contracts.

Before You Start

Ensure you complete the following steps before getting started with clusters:

- Create the required users and assign role security. For more information, see Setting Up Role Security for All Objects from Getting Started guide.

- Create profile option. For more information, see Configuring Profile Options section.

- Activate the page layouts. For more information, see Activating Layouts for Objects section from Getting Started guide.

Create Clusters

To create a cluster, perform the following steps:

1. On the springboard, click **Clusters > Create**.
2. Specify cluster name and click save and continue.
3. Go to Accounts subtab and click Search and Add accounts.
4. Select one or more accounts and click **Save** to add accounts to cluster.

   Accounts are now added to cluster.
5. Go to the clusters list page.
6. Click **Clusters > Active** .
7. Click **Save and Close**.

   The cluster is now active and available for associating with other downstream activities. The cluster must be in active status and not in draft status because certain options such as publishing merchandising location plan are not available for a cluster in draft status.

Associate Clusters

You can perform similar steps to associate clusters with the following downstream activities:

- Business objectives

- Assortment plans

- Promotion programs

- Print Templates

- Contracts

- Contract templates

Here's an example of how you can associate the cluster with a promotion program:

1. On the springboard, click a **Promotion Programs** from the list.
2. Go to **Clusters** subtab and click **Search and Add** .
3. Select a cluster and click **Save** to add cluster to the promotion program.

   Cluster is now associated with promotion program.

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Delete a Cluster

To delete the cluster, perform the following steps:

1. Sign in as marketing manger.
2. On the springboard, click **Clusters.**
3. Go to the cluster you want to delete.
4. Click **Actions > Delete**.

    Your cluster is now deleted.

Manage Distributors

As a sales manager or a sales administrator, enable the distributor option while creating accounts, associate price books and assortments, and map the account-distributor relationship.

To create a distributor, create an account and enable the **Distributor** option.

You can source products from an account or its distributors. Here's how you can create a distributor.

1. Go to **Distributor > Create**.

    Specify the distributor name, phone, and other details.
2. Select the owner from the available list.
3. Click **Save and Close**.
4. From the distributor summary page, click Accounts.

    Search and associate an account to the distributor. You can directly add multiple Accounts to the Distributors from **Accounts > Add**.
5. Click **Save and Close**.

To map accounts and distributor relationship:

1. Go to **Account Distributor Relationship > Create**.

    Specify the account distributor relationship name and select the owner from the available list.
2. Select and associate the price book, distributor, and account from the available list.
3. Click **Save and Close**.

While adding an assortment line to an assortment, you can specify the distributor for the product. You can add same products from multiple **Distributors** to an **Assortment Line**. Do not select any distributor, when the product is from a company outlet.

> **Note:** Remember, you can add a product from a Distributor in assortment line only once. Don't add same product from the same distributor more than once to avoid errors such as `The product that you selected was already included in the assortment.`

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4 How to Work with Products

Product Attribute Sync to Assortment Line

Products are the key objects in consumer goods retail execution.

Introduction

Products are used in different areas of the application and one such key area is the assortment lines. Any change made at the product level must be distributed to the corresponding assortment lines. Whenever a product is modified, it initiates an ESS job to update corresponding assortment lines of the product. It considers any changes in the field name, description, category, and default UOM, and updates the corresponding details in assortment lines.

Profile Options

Updates to assortment lines are performed in batches. The batch limit is defined using the **ORA_ACO_PRODSYNC_ASRTLINE_BATCH_LIMIT** profile option. The logging level is controlled using the **ORA_ACO_PRODSYNC_LOG_LEVEL** profile option. The values range from 0 to 5 where 5 indicates highest logging.

> **Note:** The product update deals with updates in assortment lines. You must not trigger assortment plan publish along with product update to avoid creation of unreliable data.

Product Assortments

With the consumer goods web application, you can work with product assortment and planogram.

Product assortment is the collection of products that a business makes or a retailer offers for sale. The main characteristics of a company's product assortment are:

- Its length or number of products.
- Its breadth or number of product lines.
- Its depth or number of product varieties within a product line.
- Its consistency or how products relate to each other.

Planogram is a diagram that shows how and where you can place specific retail products on the retail shelves or displays to increase sales.

To create product assortments:

1. Sign in as the sales administrator.
2. Click **Assortments** on the Springboard and click **Create**.
3. Enter a unique name for the product assortment record and a description.

   You have created an assortment record.

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4. On the Assortment Summary page , click **Attachments** and attach any planogram related attachment. Click **OK**.
5. Click **Product Assortment Line** subtab, click **Create** to add products to the assortment and enter the necessary values such as legal entity, business unit, and preferred UOM.
6. Click **Save and Close**.

To associate the newly created assortment to an account:

1. Click Accounts from the springboard page and select an account.
2. Click the Assortment field and select from a list of assortments created to associate with the account.

   You can also select **Create New and Select** if you don't have the required assortment record created to associate with the account.
3. Click **Save and Close**.

To apply assortment to a promotion and enable the add to cart option for promotions that have an associated assortment, see the Oracle Customer Experience Cloud Getting Started with Consumer Goods Implementation.

Priority Products

You can set product selling priorities on changing company priorities and market conditions. You can make such product priorities available to the sales team and measure the results for each account for continuous selling guidance.

Understand two central concepts for managing priority products:

- Priority Portfolio
- Priority Portfolio Attainment

Create and Associate Priority Portfolio

As an account manager, you can promote priority portfolio over non-priority products by creating a product portfolio. Include the product categories and modify individual stock keeping units (SKUs) to suit your business requirement.

Perform the following steps to add products to the product groups to create priority portfolio:

1. Select Product Groups from the springboard and click **Create**.
2. Enter the name and description for the product group and click **Save and Continue**.
3. Navigate to Priority Products subtab and click **Add**.
4. Search for products by category, brand, and size and select them. Click **Done**. The selected products have been added to the product group.

   After the products have been added to the product groups, you can add the product groups to the priority portfolio. To do add product groups to the product portfolio, perform the following steps:

   a. Navigate to the Home page and select the Priority Portfolios on the springboard and select **Create**.
   b. Provide the name and description and click **Save and Continue**.
   c. Select the Product Groups subtab and click **Add**.
   d. Search for product groups by name and description and select the product groups according to your requirement. Click **Done**.

      The selected product group is added to the priority portfolio.

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You can associate a priority portfolio to an account. To associate a priority portfolio to an account:

1. Navigate to Accounts and select that account that you want to associate the priority portfolio with.
2. Click the Profile subtab.
3. From the Priority Portfolio drop-down list, select an existing priority portfolio that you want to associate with the account.
4. Click **Save and Close**.

View Priority Portfolio Attainment

As a salesperson, track and measure the sales results against the set priorities for each account.

To view the priority portfolio attainment:

1. Select Accounts from the springboard and select an account.

   You can view the product group infolet on the Account Overview page.
2. Select the Analytics subtab and view the details of the priority portfolio attainment including:

   - Attainment for each product group
   - Number of orders and sales amount for each priority group

Assortment Plan

Assortment planning helps you select and assort products into groups to suit your business requirements. Using assortment plans, you can accomplish the following business goals:

- Group the right products and quantities to match market demand.
- Offer this assortment plan to maximize sales and profit for a specified period of time.
- Meet the financial objectives and seasonality of the merchandise and ensure proper receipt flow.
- Associate the plans to clusters to meet your business needs and requirements.
- Attach planogram to the assortments.
- Operate with speed and efficiency at cluster, account, product, contract, customer, and location levels.
- Plan downstream activities such as clustering, business objectives, contract management, and promotion programs.

Create Assortment Plans

To create an assortment plan:

1. On the springboard, click **Assortment Plan Create**.

   Create assortment plan page appears.
2. Specify values for the fields such as assortment plan name.
3. Click **Save and Continue** to create a **Draft** assortment plan.
4. From the Assortment Plan Summary subtab, go to the **Assortment Group** subtab and click **Create** to add the required product groups to the assortment plan.

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Your assortment plan is now saved.

5. Go to the assortment line subtab to see associated products for the assortment group.

   Optionally, click create to add individual products to an existing assortment line.

6. Go to the photos subtab to add attachments for the assortment plan.

   > **Note:** Content and Experience cloud support helps you attach the files for downstream tasks.

   You can view the attachments from Accounts > Profile > Assortments

7. Click **Save and Close**.

   Your assortment plan is now saved.

   You can now proceed to associate the assortment plan to the clusters.

Associate Assortment Plan with Clusters

You can associate assortment plan to an existing cluster to apply assortment plan to all the accounts in a cluster.

1. On the springboard, click **Assortment Plan**.

   Click a link to edit an assortment plan.

2. Click **Clusters** subtab.

3. Select a cluster from the **Clusters** list and click **Save**.

4. Cluster is associated with your assortment plan.

   You can now publish the assortment plan.

Publish Assortment Plan

Sign in as sales administrator or marketing manager role to publish assortment plan to clusters. When you add an assortment plan to a cluster, all the products in that assortment plan are added to the accounts linked to the cluster.

To add an assortment plan to a cluster:

1. Go to the **Assortment Plan**.

2. On assortment summary page, select **Actions** > **Publish**.

   Your assortment plan is now published.

3. Specify **Publish > Now** to publish the assortment immediately or select **Publish > Later** to schedule the publishing job.

   You can schedule the date for publishing.

4. On assortment summary page, select **Actions** > **Revise** or select **Actions** > **Deactivate**.

   Your assortment plan is now modified.

You can associate and publish assortment plans to accounts and clusters as:

- Exclusive assortment: On publish, assortment plan is mapped to accounts within the clusters.

- Shared assortment: On publish, assortment plan is mapped to accounts within and outside the cluster.

When you publish the assortment:

- A common or single assortment is created and associated to all accounts which has no assortment; this means sharing an assortment.

- If an account has an individual or exclusive assortment, the same assortment is merged or updated with the values from the corresponding assortment plan details.

- If a cluster and its associated set of accounts share a common assortment and the same assortment is also shared accounts outside the cluster, a new assortment is created and shared among the given set of accounts within the cluster.

- If a set of accounts within the cluster are sharing a common assortment and the same assortment isn't shared by other outside accounts, this shared assortment is updated or merged with assortment plan details and continue to share the same.

Reduce the number of new assortments created for Shared and Exclusive account assortment.. You can manage these operations with assortment creation and assortment association sub jobs.

Performance Improvement: To improve performance, track the last active date of the assortment plan. When you create or revise the assortment lines, the job publishes the changes to all associated accounts or clusters. When you add any new accounts or clusters after the last published date, the job publishes the changes only for those new accounts or clusters.

For example, you associate 10 accounts to a assortment plan. When you publish, the new assortment lines are created for all these 10 accounts. And when you create or revise the plan and then add 2 new accounts, the job publishes changes for the newly created accounts only.

> **Note:** To do a full publish, delete the last active date from the assortment plan.

Add Planograms

As a marketing manager or sales administrator, you add attachments to the assortment plans for publishing to the assortment. You can use the planograms as attachments for downstream activities without replicating the attachments.

1. Go to **Assortment Plan** and edit a draft assortment plan.
2. On assortment summary page, go to the **Photos** subtab to upload attachments.

   When you add attachments for the first time, provide your Oracle Content and Experience Cloud credentials.

   > **Note:** Ensure that your administrator enabled the cloud setup.

3. You can select and add or, alternatively drag and drop the attachments.

   You have now uploaded the attachments to the assortment plan.

You can use these attachments for downstream planning without the need to re-upload attachments later.

Additional Information

You may find the following additional information useful while working on the assortment plan.

- You can use assortment plans as a standalone solution for individual account or in combination with clusters.

- Remember, deleting an assortment group deletes all assortment lines from the assortment group.

- When you publish an assortment plan to an account, a new assortment is created with assortment lines from assortment plan.

- Changing the assortment group can re-calibrate all the assortment lines by updating the assortment line attributes.

- When the same product is available in more than one product searches or product groups, the new assortment line record overwrites the old one.

Manage Price Books

As a marketing manager or sales administrator, you can plan, create, and revise the product pricing for multiple accounts with the price book option.

- Manage the price books across multiple accounts at scale.
- Plan and allocate product pricing and tax rules across multiple accounts at scale.
- Associate the price book to cluster for better segmentation and downstream activities.
- Improve the pace and efficiency of your retail operations.

Here's how you can associate the price books with Clusters:

- Add multiple products, tax codes, tax methods, currency, and other information.
- Associate and publish price books to clusters and accounts.

Create Price Books

As a marketing manager or sales administrator, here's how you can create a price book:

1. Go to **Price Book > Create.**
2. On the **Price Book** page, specify the values for the fields such as the price book name, currency, tax methods, tax codes, and other details.
3. From the products section, click **Add** to select the product, units, list price, percentages, and codes
4. Click **Save and Close** to create a draft price book.

You can proceed to associate the Price Book with the clusters.

Associate Price Book with Clusters

To associate a price book with clusters:

1. On the price book summary page, go to the **Clusters** subtab.
2. Search and select a cluster from the **Clusters** list and click **Save**.

   Cluster is now associated with your price book.

   You can publish the price book.

You can create, publish, copy, revise, and delete the price book.

Publish Price Book

1. On the price book summary page, click **Actions > Publish**.

Price book is now published to the cluster.

When the schedule process is complete, the price book status changes to **Active**.

2. Go to **Cluster > Account > Profile** to see the price book.

Copy or Revise Price Book

- On the price book summary page, click **Actions > Copy**.

  The price book is now copied.

- On the price book summary page, click **Actions > Revise or Deactivate**.

  The price book is now revised.

  Remember, you can deactivate or revise only an active price book.

Manage Price Books and Taxation

Price book contains the pricing information of your products. As manufacturers and retailers, you can create and use account-specific pricing in the price books.

You organize and associate organization-specific product pricing along with the tax values. You include the list of approved products for sale, and optionally, two product-specific taxation values to specify the tax values for each product. Price books can be associated with accounts and routes.

The implementation and usage of the price book is role-specific and depending on your role, you can create and associate the price book. The sales administrator role has the privilege to create price book. All users except the marketing manager user can associate a price book with a route and an account.

Create Price Books

Users with sales administrator job role can create price books that can be later associated with multiple accounts.

> **Note:** For a product to be available in the price book, it must first be added to the sales catalog. For more information about creating sales catalog and adding products to it, see the Creating Your Sales Catalog chapter in the Oracle CX Sales Implementing Sales Guide.

For more information about creating price books, see the Setting up Common Components chapter in the Implementing Sales Guide.

> **Note:** When you add products to a price book, ensure you select the same UOM that's used in Oracle Product Value Chain Cloud Product Information Management.

Associate Price Books with Accounts and Routes

You can associate price books to account and route.

- Associate price book to account:

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To associate a price book with an account you select the Accounts icon on the springboard. Select an account and go to the Profile tab. From the price book picker, you select the price book to associate with the account. Price books can be associated with accounts provided they have the same currency.

- Associate price book to route:

  Go to the Route object on the springboard and select a route. On the Route Detail page, select a value for the price book from the price book picker to associate a price book to a route.

Manage Taxation

As a sales administrator, you can enter the taxation rates in the price book for each product. Taxation rates can be in percentage or amount. The taxation rates are defined based on the product in the price book.

To set up tax values for products:

1. Go to **Price Books** and select a price book record.
2. Select the **Tax Code** and **Tax Method** applied to all products in the price book.
3. Enter tax percentage or amount values for each product listed in the price book for the account.
4. Click **Save and Close**.

You tax amount calculation is ready for generating invoices.

5 Activities and Appointments

Manage Activities

As a sales representative, you typically see your calendar for appointments that you have on any particular day before you begin your retail visit.

You can plan your day based on the appointments and the notes if any that you have or want to include in your appointment. Here's what you can do when you work with appointments:

- Add resources to an appointment.
- Use appointments to see your schedule and the visits that you need to make.
- Review the details of the visits for an account and plan your tasks for the day.
- Add an account to an appointment and the appointment is assigned to a field sales representative who's the owner of that account and appears on the assignee's calendar.
- Create notes for any additional information that you may need to record regarding your retail visit.

Appointments are part of the activities object and you can either create appointments or import them. For more information on importing appointment, see Importing Activities in Understanding Import and Export Management for CX Sales and B2B Service guide.

For more information on activities, appointments, tasks, and notes and how to search and view them, see Activities in Using Sales guide.

Manage Appointments

You can perform the visit tasks by managing the appointments, tasks, notes, and how you check-in and check-out from a retail visit.

Check in and Check out of a Retail Visit

You can perform various tasks when you're visiting a retail store. You check in to a store to start the retail visit. You must sign in using a field salesperson or a sales manager role to check in into an appointment.

To check in or check out:

1. Go to **Activities**.
2. Double-click an appointment in the calendar view.
3. Click **Actions > Check-In**. When you have completed your visit, click **Actions > Check-Out** from the edit appointment page.
4. Click **Save**.

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Schedule Appointments

You must sign in using the field salesperson or the sales manager role to create or edit appointments.

To create appointments:

1. On the springboard, click **Activities**.
2. Select the Calendar subtab.
3. Select a date and click **Create Appointment**.
4. Provide the details about the appointment.

   Among other details, you typically specify the appointment name and duration, and the account for which you're creating the appointment. The owner of the account is added as a resource in the appointment. You can also add the Store Visit Type and select the Store Visit check box. Your appointment record count is reflected in the Visit vs Target infolet.
5. Click **Save and Close**.

   To edit appointments:
6. Double-click the appointment that you want to edit.

   > **Note:** You can select day, week, or month view to quickly locate your appointment in the calendar.

Schedule Tasks by Store Visit Type

As sales administrators and marketing managers, you manage task delegation and field operations more effectively. Using this task scheduling framework, you can assign different resources to do different tasks for the same account. For example, merchandisers are assigned with merchandising tasks and delivery representatives to deliver the products of a route or account. For example, you can schedule similar tasks to the same salesperson at account-level by store visit type or task type or activity type and more.

Here's how you can use the task scheduling:

- Create and assign visit types to the planned tasks.

- Schedule visits of specific types to the appropriate routes.

- Assign different resources to complete a different set of tasks.

- Allow the application to match the tasks to relevant planned visits.

- Improve your field operations by effective task delegation.

Based on your task schedules, your salesperson and field staff can complete the tasks.

Here's how you can schedule store visit task in an appointment:

1. Using an ESS Job: Populate store visit task (Dynamic scheduling).

   PopulateStoreVisitTask ESS job will schedule all account tasks under accounts, as store visit tasks under appointments.
2. Associate a store visit type (Static scheduling).

   All store visit tasks under store visit type will be scheduled as store visit tasks under appointment. Create a store visit type. Associate store visit task to that store visit type. Store visit task can be any task such as inventory audit promotion presentation. Administrator can also schedule targeted surveys for accounts from store visit type. For such type of tasks, administrator can specify a survey template to provide clear direction on the

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surveys to be executed. In such cases, administrator can conduct surveys against account. Associate this store visit type to an appointment, then all the tasks associated to type will get scheduled for the appointment. See the following steps to schedule a store visit task by type. If an administrator wants both static scheduling and dynamic scheduling for an appointment, create dynamic store visit type and associate store visit task.

Here's how you can create a specific survey task within store visit tasks:

   a. Create a store visit type.
   b. Fill the details and click **Save and Continue**.
   c. Switch to Store Visit Task subtab and add task.
   d. Search and add target survey.
   e. Associate a survey template and click **Save and Close**.
   f. Create an appointment and associate store visit type.
   g. Click **Save and Continue**.
3. Create individual store visit task.

   Administrator can also create store visit task from appointment. It is also possible to create a targeted survey and associate a survey template. This survey will be executed against account.

Here are store visit task details:

- Store visit is of two types, static and dynamic.

- For static store visit type, store visit task is populated at the time of creation of store visit task.

- In dynamic store visit type, store visit task is scheduled dynamically.

- Business plan has objectives and each objective has associated objective tasks.

- When the business plan or an objective is published, these tasks are populated as account tasks.

- If a task (activity) has a related store visit type that matches the store visit type (dynamic) of a store visit appointment, the task will be scheduled for the store visit appointment.

- For an appointment that has a type value, the account objective task having the same store visit type will be scheduled for that appointment.

- If the appointment gets assigned to the account owner, the tasks of null type also get scheduled to the appointment.

- For appointments that are scheduled after business plan publish, you can schedule the task by running an enterprise scheduler service job.

- This job will find all the activities which aren't scheduled by business plan publish and associate objective task accordingly.

- Independent job will schedule all account objective tasks irrespective of objectives or status of the objective.

- This job will also check for checked out appointments and collect all completed objective tasks from these appointments.

- Then this job will mark these tasks as completed (nonrecurring task) or in progress (recurring task) at account level.

Here are appointment details:

- Appointments can be created without a store visit type.

- In such cases, account objective task with no store visit type associated will get added as store visit task for this appointment if account owner and appointment owner are the same.

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- For an appointment having static store visit type, account objective task won't get associated.

- If store visit type of an appointment is changed after publish and user wants to publish again then new account objective task will be added according to new store visit type but the already published changes will remain as such.

- Store visit tasks can be recurring and nonrecurring.

- Recurring task will get scheduled as long as its duration ends.

- Nonrecurring task will get scheduled as long as it's marked as complete.

- While scheduling a nonrecurring task, job will search for the first appointment in the given duration and schedule nonrecurring task for that appointment. You can specify this duration.

- For independent job appointment, start date and end date are considered. If you specify no start date and end date then appointments from current time to 3 months are considered.

- It is possible to exclude a particular account task from `Populatestorevisittask` process. There's a field called **Exclude Visit** in account task. Mark that check box, then `Populatestorevisittask` won't consider that particular task for publishing.

- There's no impact on existing store visits and child tasks relevant to changing the value of the check box at account task level. It has effect only during the populate store visit task job.

- This check box could be set in objective task, contract or contract template task, or individually for an account task and where included in objective or contract or contract template task, thus the check box is populated to account task.

- Account task level changes get overwritten when you publish an objective or approve a contract.

PopulateStoreVisitTask (Independent Enterprise Scheduler Service Job)

Enterprise Scheduler Service Job Name	Job Description	Parameters Applicable
PopulateStoreVisitTask (AcoBulkProcessing)	Schedules store visit task to all appointments in a specified window.	- Attribute1 (Job Name): **PopulateStoreVisitTask** indicates the name of the job to be executed. - Attribute2 (**Diagnostic Mode**): Indicates if diagnostic mode is enabled or disabled. Enabling the diagnostic mode helps in collecting log and debugging as well. Run the job with this value as **N**. - Attribute5 **UseRelativeTime**: If this is set to "Y", the following relative time parameters are used. In case of 'N', the existing absolute time parameters are used. - Attribute3: **StartDate** , if Attribute5 is 'N', this field indicates the start date for which appointments need to be considered OR **Relative Start Offset** in Days. If Attribute5 is 'Y', this field indicates the start day of the publish store visit task expressed as number of days from the execution of the scheduled run. - Attribute4: **End date**, if Attribute5 is 'N'. This field indicates the end date up to which appointments need to be considered OR **Relative Start Time** if Attribute5 is 'Y'. This field indicates Time

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Enterprise Scheduler Service Job Name	Job Description	Parameters Applicable
		of Day and Time Zone for the run. This should be expressed as HH:MM +00:00 where +/- 00:00 is standard time zone offset and HH is 24 hour clock as per ISO times. • Attribute 6: **Relative Duration** in Days. This field indicates the duration of the period to cover, expressed as number of days from the start day. This field is valid only if Attribute5 is 'Y'.

To populate store visit task, schedule AcoBulkProcessing enterprise scheduler service job.

Administer Store Visit Type with Child Tasks

When you as an administrator create store visit types, you must specify if the store visit type is static or dynamic. Static types can have a set of specifically assigned child tasks that can be duplicated for any calls using the store visit type. Dynamic store visit types will have their tasks assigned as part of the PopulateStoreVisitTasks ESS job. This is not always an either or decision. For example, a market administrator may prefer to create a brief list of tasks that must always be completed for a certain type of store visit and also may want to have key objective and contract tasks assigned to calls with that store visit type. This requires removal of the restriction such that an administrator can define a store visit type that has the specifically assigned and named child tasks, and also the task will be included in the PopulateStoreVisitTasks ESS job.

> **Note:** *Child store visit tasks are available by default for static store visit type but this can be changed during implementation by* deprecating the detail page layout, ORACO Dynamic Type Layout in the store visit type `(_ORACO_ActivityType_c).`

Relative Dates

The relative dates concept helps you to use relative time instead of absolute time.

Along with start date and end date, the following parameters support relative dates.

- Use Relative Start Time (Argument5):
  - If this is set to "Y", the following relative time parameters are used and the existing absolute time parameters are ignored. Otherwise, the existing absolute time parameters are used.

- Relative Start Offset in Days (Argument3):
  - The start day of the publish store visit task expressed as number of days from the execution of the scheduled run.
  - The default should be zero (for same day).
  - For example: Setting a recurring scheduled process for Mondays with "Relative Start Offset in Days" being 2 would imply that the period to cover would start on Wednesday.

- Relative Duration in Days (Argument6):
  - The duration of the period to cover expressed as number of days from the start day.
  - Overlapping periods must be allowed.

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- o The default should be one (for one day).

- o For example, setting 7 would indicate a week. Setting 31 would guarantee coverage for a whole month.

- Relative Start Time (Argument4):

  - o Time of Day and Time Zone for the run. This should be expressed as HH:MM +00:00 where +/- 00:00 is standard time zone offset and HH is 24 hour clock as per ISO times.

If Use relative time is set to Y then Relative parameters are used to calculate start date and end date. In case of relative time, by default, tasks are scheduled for 1 day. If Use relative time is set to N, then given absolute start date and end date are used. In case of absolute time, by default, task are scheduled for 90 days.

As a part of the relative dates concept, new formats are supported for start date and end date. These are:

- `"yyyy-MM-dd hh.mm.ss.SSSSSS a XXX"`

- `"yyyy-MM-dd HH:mm XXX"`

- `"yyyy-MM-dd hh.mm a XXX"`

- `"yyyy-MM-dd hh:mm a XXX"`

If one of the input is wrong, the job results in error. Verify the enterprise scheduler service job logs for details.

Attribute Number	Parameter	Value
Attribute1	JavaJob Name	PopulateStoreVisitTask
Attribute2	Diagnostic mode	N
Attribute3	If Attribute5 is N Start Date (Date with time zone)	2020-08-01 11:20 AM +00:00 OR 2020-08-01 20:20 +00:00 OR 2020-08-01 11.20.20.000000 AM +00:00 (Default Value: Current time.)
Attribute3	If Attribute5 is Y Relative Start Offset in Days	Default value is 0.
Attribute4	If Attribute5 is N End Date (Date with time zone)	2020-08-20 11.20.20.000000 AM +00:00 (Default Value: Start Date + 90 days)
Attribute4	If Attribute5 is Y Relative Start Time	09:30 +5:30 (Default Value: 00:00 +00:00) (Time stamp format :'HH:MI +00:00')
Attribute5	Use Relative Start Time	Y/N (Default Value: N)

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Attribute Number	Parameter	Value
Attribute6	Relative Duration in Days	Default value is 1. No need to fill if Attribute5 is N.

The independent job ensures the following:

1. Checks for completed appointments. In these completed appointments it will check for completed store visit tasks.
2. If completed, it will mark the corresponding account objective task as completed for a nonrecurring task and as in progress for a recurring task.
3. If an appointment is created after the business plan publish, then store visit task can be scheduled by running this independent job.

Note: The recommended scheduling exercise duration is one week.

Details to Schedule an Independent Job

- You can schedule an Independent job with and without providing start date and end date.
- Date format should be as given or else job will result in error. Enterprise scheduling service job will go to retrying status.
- You can provide either both start date and end date or don't provide both.
- You can provide negative value for duration and offset. In such cases, the resulting date will be a past date. Segment lookup code should not have any special characters.
- You can also give a past date as start date and end date. In such cases, store visit task will be scheduled for past appointments in not started status.
- If no start date is mentioned, current time will be considered as start date and if no end date is mentioned then current time + 90 days will be considered as the end date.
- If start date is provided and end date isn't provided then end date will be start date + 90 days. If one of the input is wrong, the job results in error. Check the enterprise scheduler service job logs for details.
- Changes in account objective task are pushed to appointments. For independent job, objectives with all statuses will be considered. Only published changes of business plan are populated.
- To reflect business plan level changes, you have to publish business plan.
- Appointments populated by business plan can't be changed through independent job. It can be updated only through the business plan publish.
- For efficient scheduling, already scheduled appointments won't be considered for scheduling.

Sample Set of Relative Parameters

Case 1: One month of coverage, one week in advance.

Attribute Number	Parameter	Value
Attribute1	JavaJob Name	PopulateStoreVisitTask

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Attribute Number	Parameter	Value
Attribute2	Diagnostic mode	N
Attribute3	Relative Start Offset in Days	7
Attribute4	Relative Start Time	Not applicable
Attribute5	Use Relative Start Time	Y
Attribute6	Relative Duration in Days	30

Case 2: One week of coverage, for start of business day tomorrow running at 9 pm today.

Attribute Number	Parameter	Value
Attribute1	JavaJob Name	PopulateStoreVisitTask
Attribute2	Diagnostic mode	N
Attribute3	Relative Start Offset in Days	1
Attribute4	Relative Start Time	09:00 +00:00
Attribute5	Use Relative Start Time	Y
Attribute6	Relative Duration in Days	7

Here's how you can schedule an enterprise schedule service job for AcoBulkProcessing (absolute dates and relative dates):

1. Sign in using sales administrator role.
2. Go to Enterprise Scheduler Service page and schedule **AcoBulkProcessing** in the Schedule New Process section.
3. Fill in parameters for **Absolute dates**.
4. Fill in parameters for **Relative dates**.

   Objective tasks are scheduled as store visit tasks.

   Edit Account: Activities page opens.
5. Click appointment name.

   Edit Appointment: Store Visit Tasks page opens. Task, name, objective, and objective task are available.

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Return Products by Order

As a sales administrator, you can return the products in two ways; return any products present in the store and return any product from a single specific order. Here's how a sales representative can generate the return request for the products of an order:

Based on the configuration, a sales representative can process either a full or partial return of a specific order. Select the order and request for a return of all or some products by specifying the products name and product quantity. Pricing is averaged to ensure that accounts may not return only the highest-priced line items, though customers may, of course, add their own pricing and taxation rules in implementation with the help of mobile scripting.

1. Go to **Orders**.
2. Double-click an order to see the list of products and quantity.
3. Click **Return Order**.

   Specify the reason and click **Add** icon to open the product picker.
4. Select the products and quantity.
5. Click **Submit** to create a return for the order.

Work with Print Templates

As a sales administrator, you can create mobile printing templates in the PDF Form. Associate the template with orders, invoices, payments, route inventory audit, inventory reload, and route settlement. Based on the configuration, your salesperson can print the associated template from the mobile application.

Here's how you can work with the print templates:

- Configure the print templates to provide customer-specific print requirements such as contracts.
- Define the fields, objects, languages, and other details of the print template.
- Provide an option to capture secure signature for validation and audit.
- Generate a PDF dynamically during the store visits, for example, print the templates in print with your customer.
- Create print templates from web and print the template from your mobile application.
- Associate the print template with the clusters, contracts, order, invoice, payment, inventory load, inventory reload, and route settlement.
- Improve the pace and efficiency of your retail operations from mobile application and device.

What's a Print Template?

Here's how you can create the PDF print template, associate the template with your retail activities, and enable the printing. You can configure the following items for the template:

Design Template Structure:

Use the PDF form generator tools to define the template structure and format page layout, format, set of text fields, and more. The form supports text wrap, signature fields, and more.

Define Templates:

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Configure the stakeholders, activity, page format, language, and currency settings based on your business requirements. For example, define the contract stakeholders, contract terms and conditions, benefits, format, language, and currency settings.

Manage Templates:

Assign the print template to generate the printable PDF and share the print during your store visits.

- You can associate order, invoice, and payment with **Account** from the accounts, profile section.
- Associate inventory load, inventory reload, and route with **Route** from route summary page.

Create Print Template

To print the templates in the required format, create the print template:

1. On the springboard, go to **Print Template > Create.**
2. Specify the values for the fields such as the template name, type, and maximum table columns details.

   Note: Ensure you select the required `Max Table Columns` for readability and format. When the column size exceeds the maximum wrap limit, the PDF form prints the tables as a list.

3. Select one of the available template types from **Template Type**.

   You may select contract, order, invoice, payment, inventory load, inventory reload, and route settlement.
4. Click **Save and Close** to create the print template.

   Proceed to add template files.
5. Go to the **Template Files > Create**.
6. Search and select the following types of file from the list and click **Save**.

   - Mobile Body: Associates the PDF file with text to display as the body of the template.
   - Mobile Header: Associates the image to display as the header of the template.
   - Mobile Footer: Associates the image to display as the footer of the template.

   Note: You can attach files of PDF and JPG formats.

7. Go to the **Clusters** subtab.
8. Select a cluster from **Clusters** list and click **Save**. Cluster is now associated with the print template.
9. You can now publish the print template. When the schedule process is complete, the print template status changes to Active.

   Note: For the route level and contract print templates, the cluster support is unavailable.

10. For contracts, create a **Signature** field for secure signature capture.

    You can include multiple signatures in your print template.

    Note: Ensure your salesperson capture all the signatures to mark the document **fully-signed**. You can print a fully-signed or a partially-signed document. You can use these signatures for validation purposes later.

11. Click **Save and Close**.

    Print template is now created. Proceed to associate the print template.

Associate Print Template

As a sales administrator, you can associate the print template with the **clusters, contracts, orders, invoices, payments, inventory loads, inventory reloads,** and **route settlement**.

Here's a sample procedure to associate the print template with a contract:

1. On the springboard, go to **Contract > Create**.
2. Specify the values for the fields and select the **Print Template** from the list of templates to associate with the contract or contract template. You can select an existing contract and select the print template to associate.
3. Click **Save and Close** to associate the print template to the contract.

Your salesperson can use the print button available on the **Contracts** page to manage contract activity.

You can publish and assign the print template to multiple accounts that are associated with clusters.

When your field team gets back online, the data along with the signed print template is synced. You can check it from the summary page, for example, **Contracts > Print Documents**. You can use these documents for audit and other retail operations.

> **Note:** You can manage the approval and publishing flows.
> - You can use the **Approve** option for all types of print templates such as the account level, the route, and for contract print templates. However, use the **Publish** button for account-level print templates such as Order, Invoice, and Payment.
> - The print templates change to the **Active** status only after publishing the template.

Create Notes

You can create notes for any additional information that you may need to record regarding your retail visit.

As a sales representative, you can take notes related to a particular store visit. For example, if the sales representative isn't able to present the promotions to the store manager because the store manager isn't available, the sales representative can add a note to this specific store visit. You must sign in using a sales representative or a sales manager role to create notes for Activities.

To create notes for activities:

1. On the springboard, click **Activities**.
2. Select the Notes subtab and click **Create Note**.
3. Click **Save and Close**.

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6 Business Plans

Business Plan and Objectives

A business plan helps you create business objectives, accomplish a set of activities, and monitor key performance indicators (KPIs) to measure the success of the objectives. You can manage Business Plan and Objectives to support various retail business operations:

- Create a set of important activities to achieve a business objective.
- Operate with speed and efficiency at cluster, account, product, customer, and location levels.
- Plan downstream activities such as route planning, visit management, clustering, and business objectives.
- Map the business plan and objectives to a unique set of targeted account clusters for better execution.

As a marketing manager or sales administrator, you can

- Create a Business Plan and Objectives.
    - Create a set of important activities
    - Devise and publish objectives
    - Create and track KPIs for performance monitoring
- Associate the business plans and objectives to accounts and clusters to meet your business needs.
- Manage publishing operations for the business plans and objectives.

When you publish a business plan or objective, account-level tasks are created based on the tasks defined in each business objective. During the store visit appointments, your salesperson can perform these tasks.

Create Business Plan

As a marketing manager, perform the following steps to create a business plan:

1. On the springboard, click **Business Plan > Create**.

    Create business plan page appears.
2. Specify values for the fields such as business plan name.
3. Click **Save and Close**.

    Your business draft plan is now saved in the **Draft** state.

    > **Note:** Remember, you can add objectives to a business plan only when the business plan is in the draft status.

    Proceed to **Submit** for approval.
4. Go to the business plan summary page, select **Actions >** > **Submit** for approval.

    Your business plan is in the **Pending Approval** state.

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Based on your approval flow, your business plan is now **Approved**.

You can now proceed to add objectives to this business plan.

Add Objectives to Business Plan

Objective helps you manage your workforce efficiently by creating and accomplishing cluster-specific, account-specific, store-level, segment-level, and route-level efforts.

1. From the business plan summary page, click **Objectives > Create** for a new objective.

   Specify values for the fields such as business plan name, category, and owners.
2. Click **Save and Close**.

   Your objective is now saved in the **Draft** state.
3. Add an objective-level KPI by clicking **Create Objective KPI**.
4. Specify Objective KPI name, select KPI Library, specify values for the fields, and click **Save**.

   You can also delete and split an existing objective KPI.
5. Proceed to create the activities that your sales team can perform as part of an objective.
6. Go to **Activities** sub tab and click **Create Task**

   Specify the suitable subject, priority, category, other task fields and save the task.

   > **Note:** **Create Appointment** and **Log a Call** activities aren't supported.

7. Sign in as sales administrator or marketing manager role to approve the objective.
8. Go to the objectives summary page, select **Actions** > **Submit** for approval.

   Your objective is in **Pending Approval** state.

   Based on your approval flow settings, your objective is **Approved**. Remember, you can publish objectives that are in the **Approved** state. Ensure you approve the objectives for publishing the business plan.

> **Note:** If you want to exclude a task from publishing, select Exclude check box. If a task is excluded then Account objective task won't be created for this task. There won't be an account copy for the task and the task won't get scheduled for appointments. If after publishing, you attempt to exclude a task then the published objective task will be marked as obsolete.

> **Note:** You aren't allowed to delete a task if the associated objective is already published. If there is an Account Objective task associated to an objective task then you can't delete the task.

Create Objective Task, Objective Accounts, and Objective Clusters

As a marketing manager, perform the following steps to create objective task, objective accounts, and objective clusters:

1. Click **Business Plan** icon on the Home page.

   Business Plan landing page opens.
2. Select the business plan that you created.
3. Click **Objectives** subtab.

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4. Select an objective that you created.
5. Click **Activities** subtab.
6. Click **Create Task** button and provide details.
7. Use Store visit type subtab to associate a dynamic store visit type to an objective task.
8. Click **Save and Continue**.
9. Click **Accounts** subtab.
10. Click **Add** to add accounts.
11. Click **Clusters** subtab.
12. Click **Add** to add active clusters.
13. Click **KPI** subtab.
14. Click **Create** and provide details.
15. Click **Save and Close** to create the record.
16. After the record is created, you must specify start date and end date on the details page.
17. To verify an account objective under an account, drill down to an account and go to Objectives subtab.
18. To verify an account objective task under an account, drill down to an account and go to Account Task subtab.
19. To verify an account objective KPI under an account, drill down to an account and go to KPI subtab.

Lifecycle of Business Plan and Objectives

1. When a business plan or an objective is created, it will be in draft status.
2. Click **Actions > Submit** in order to submit it.

   Status changes to pending approval.
3. Click **Actions > Approve** or **Actions > Reject**.

   Status changes to approved or rejected.
4. When Status is approved, click **Actions > Publish**.

   Status changes to published.
5. A scheduled process runs and if the process is successful, status changes to active. Otherwise status changes to approved.
6. You can also opt to publish later by selecting the publish later option and specify the time to publish using schedule publish.
7. When status is active, click **Actions > Revise**.

   Status changes to revised.

Create KPI Library

Create a library of KPIs (for example, sales growth for account or cluster), assign them to a plan and objectives, and track the performance.

1. Click **KPI Libraries > Create**.

   Specify values for KPI name, Type, Target and other the fields.
2. Click **Activate** to activate the KPI.
3. Click **Save and Close**.

   After you create the KPI Library, proceed to associate with an objective.

   You can map the KPI library items to objective-level KPIs. You can now publish KPIs to Accounts.

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Associate Objectives with Accounts or Clusters

To perform the activities and tasks across multiple accounts and clusters, associate the objectives with individual accounts or with clusters:

1. Go to **Business Plan > Objective > Accounts** or

   Business Plan > Objective > Clusters
2. Search, select, and apply the account or cluster.

   The selected account or cluster is now associated with the objectives.

Publish Business Plan

Sign in as sales administrator or marketing manager role to publish business plan to clusters. Before publishing a business plan, set objective to approved status. Remember, you can publish business plans and objectives only in the **Approved** state. When you publish an objective, all tasks or KPIs under objective are created as account Objective task or Account KPI. You can check the same from Account task or Account KPI subtab of accounts.

1. On business plan summary page, select **Actions > > Publish**.
2. When you publish, the status of business plan and objectives changes to **Published** by initiating a scheduled process `AcoBulkProcessing.`
3. When the scheduled process is successful, the business plan state changes to **Active**

   ○ You can verify and confirm the publish action from the scheduler.

   ○ When the publishing process is unsuccessful, the status of business plan and objectives remains in the approved state. Fix the errors and republish the business plan.

   ○ You can verify the published activities or tasks from **Accounts > Activities > Tasks**.

   Your business plan and its objectives are now published to **Active**.

To improve performance, you can now track and manage the publishing based on the **last publish date** field.

- When you publish for the first time, all the tasks and KPIs are added to all the accounts and clusters associated with the business plan and the objective.

- When you add any new accounts or clusters after the last published date, the job publishes the changes only for those new accounts or clusters.

- When you add or revise tasks or KPIs, republish adds the revised tasks and KPIs to all accounts and clusters.

For example, you associate 10 accounts to a business plan. When you publish, the new tasks and KPIs are created for all these 10 accounts. When you revise a business plan or objective, add 2 new accounts, the job publishes the changes for the newly created accounts only. When you revise or add a task or KPIs, the job publishes the changes to all the 12 accounts.

Note: To do a full publish, delete the value of the last published date from the objective or the business plan summary pages.

Publish Objectives

Here's how you can publish objectives:

1. Approve a business objective.

2. Click **Actions > Publish** and click **Save**.

   Status of business objective changes to published. The scheduled process AcoBulkProcessing gets initiated.
3. After the scheduled process completes, the status of objective changes to active.
4. If the scheduled process results in error, the status of business objective changes to approved.
5. Check for any errors and rectify them before republishing business objective.

Publish KPI

Publishing KPI is a part of publishing objective where KPI records created under objective are populated to associated accounts. The account KPI will have a reference to both parent objective and KPI objective. You can't edit the target value in the account KPI but there is another field negotiated target to update the negotiated target value. Initially, the record will be in draft status and you can either approve or reject the KPI as the account manager. After the KPI is approved, you as the account manager can either complete or cancel the KPI.

Republish KPI

In account KPI, updatable check box is selected by default and editable. The update option works for records that have updatable check box selected by default.

Additional Information

You may find the following additional information useful while working on the business plan and objectives.

- You can use business plan and objectives as a standalone solution for individual account or in combination with clusters.

- When you publish a business plan to an account or clusters successfully, the state of business plan and objectives is Active.

- To delete objective, go to objective summary page, select the **Inactive** option to mark an objective inactive. On publishing such inactive objective, the account objective tasks are marked as obsolete.

- To delete a task in an objective, go to task details page, select the **IsObsolete** option to mark an objective task as obsolete. On publishing the objective, the specific account objective task is

- You can publish only the approved objectives or business plans.

- You can change tasks only when the associated objective is in draft or revised status.

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7 Inventory and Order Management

Manage Inventory and Orders

You can audit your store inventory to ensure there is a sufficient stock of your products at the retail store. The following sections provide details about how to manage inventory and orders.

Manage Inventory

You typically perform the following:

- Assess or audit the inventory including viewing the information about the previous audits. After those changes that are saved at the time of checkout are shown in the audit history.
- Confirm products placement and stocks in the store.
- Place order for inventory items when the stock is low through the shopping cart to add products that are required.

Manage Orders

As a salesperson, you want to ensure that there is sufficient stock of your products available at the retail store. During the inventory audit if you find that some products are low on stock, you place an order to replenish the stock of those products. Each account has a shopping cart for adding or removing the products in an order.

Here's what you can do to manage the inventory level:

- Create orders.
- Cancel orders.
- Manage order lines and order requests.

Convert Units for Products

As a salesperson, you can now use the multiple Units of Measure (UOMs) while working on the **Order Entry** or **Inventory**. Select the units for products, specify multiple units for the same product, and convert the units for product for pricing calculations.

Perform Inventory Audits

As a salesperson, perform the inventory audits to take a stock of your inventory, shelf stock, facing, location, demand, and shortage. During your inventory audit store visit task, you can also edit the placement, images, and other details.

To perform an inventory audit:

1. Tap **Accept** followed by **Start** to perform route check-in.
2. On the Landing page, tap the Appointments tab.

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3. Tap **Check In** on an appointment to go to the Tasks List page and then tap **Inventory Audit**.

   Note: To view location-specific products, filter the inventory list by location.

4. Navigate to the Details page by drilling down on a product.
5. Edit product details like out of stock, shelf stock, facing, photos, and others per your requirement.
6. To associate a display location to this inventory, tap **Display Location** and select the location to be associated.
7. To restock on products that are low in quantity, tap **Add to Cart** to add them to the shopping cart.

You can enable the photo capture for each store inventory line by creating a profile option and setting its value to Y. For more information about enabling photo capture, see Profile Options.

Order Products

During the inventory audit, you can create an order to meet the demand for inventory replenishment. Each account has a shopping cart for adding or removing the products in an order.

Create an Order

To create an order from the shopping cart, click **Create Order** from the menu. Click **Save** to complete the transaction. Your shopping cart is empty.

From the Products subtab of Order you can view order lines and applied promotion information. The order change history is available from the Order Requests subtab where you can view the order change request and their acceptance statues.

Cancel Orders

You can cancel the orders that are in the open and submitted status. The consumer goods mobile application must be synchronized with the server for the order created on mobile to reflect in the Consumer Goods web application.

To cancel an order:

Note: The ERP application accepts order cancellations.

1. Sign in as the sales representative.
2. Click the Orders icon and select an order.
3. Click **Cancel Order**.
4. Click **Save and Close**.

Revise Orders

As a telesales agent, you can change orders in the web application. Telesales agents can select an existing order and change it in the shopping cart.

You can make the following updates to orders and promotions:

- Change product and promotion quantities associated to an order

- Add or remove products and remove promotions from an order

To revise orders:

1. Sign in as a sales representative.
2. Select the Accounts icon and select the account you want to view.
3. Click the Profile subtab and click the shopping cart link.
4. Select **Edit Order** for the Order Type field from the drop-down list. Select the source order from the drop-down list for the Source Order field.
5. Click **Save**.
6. Click the Products or Promotions Subtab to make necessary changes.
7. Click **Save and Close**.

Settle Payments and Close Routes

Direct store delivery supports the process to deliver shipments from the distribution centers to stores and collect payments upon delivery. The delivery of shipment and collection of payments is organized in routes.

After a route is complete, the salesperson creates a route settlement report and records all the payments and supporting documents. The route settlement report also records bank deposit, expenses, and inventory shortage or overage occurred during the route. After the salesperson fills the route settlement report, the cashier verifies all payments and supporting documents. After the verification is complete, the cashier closes the route settlement report.

Understand the Route Settlement Report

Salesperson can receive payments in the form of bank deposits. The sales administrators set up bank deposit information for each route. It can also happen through integration. The mobile application automatically populates the information in the bank deposit record.

The key fields are provided on the Bank Deposit Summary page:

Field Name	Description
Deposit Bank Name	Indicates the name of the bank in which bank deposits for a route are deposited.
Reference Number	Indicates the unique identifier on the bank deposit receipt.
Deposit Bank Account Number	Indicates the unique identifier of the bank account in which payments for a route is deposited.
Deposit Bank Routing Number	Indicates the touting number of the bank in which the money was deposited.

Salesperson receives payments though various other methods which the consumer goods cashier must verify. During verification, the consumer goods cashier populates information for each of these payments or it happens automatically.

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As a cashier, you can use the following key fields to verify payments:

Field	Description
Total	Indicates the total amount received from a payment type.
Verified Total	Indicates the total verified amount for a payment type.
Due	Indicates the amount due from a payment type.
Verified Remaining	Indicates the difference between total verified amount and the amount due from a payment type.

The balance and the verified balance of the route settlement report is automatically populated in the route settlement report. The following are the equations to calculate the balance and the verified balance:

- Balance = (Cash + Bank Deposits + Coupons + Checks + Credit Used + Store Credit Used + Proof of Purchases + Electronic Transfers + Credit Card Transactions) - Sales Total - Inventory Shortage + Expenses + Shortage - Overage

- Verified Balance = (Verified Cash Balance + Verified Bank Deposits Balance + Verified Coupons Balance + Verified Checks Balance + Verified Credit Used Balance + Verified Store Credit Used Balance + Verified Proof of Purchases Balance + Verified Electronic Transfers Balance + Verified Credit Card Transactions Balance) + Verified Total Expenses + Verified Shortage - Inventory Shortage - Verified Overage

Pre-Settlement

Salesperson completes the pre-settlement process and creates the route settlement report. The mobile application automatically records the payment information, calculates the expected amount for each payment type, and generates the list of the expected supporting documentation.

Salesperson manually record the information about the bills and coins received as part of cash payments and if supporting documentation is available for these payments. Salesperson also use the mobile application to manually record information such as payments that were received in the form of bank deposits and expenses that were also incurred during the route.

In case there is a shortage in the inventory, the mobile application automatically calculates its monetary value and includes it in the route settlement report.

Post-Settlement

Cashiers use the web application to complete the post-settlement process and close the route settlement report when the verified balance of the entire report becomes zero. Consumer goods cashiers must review the information recorded by the salesperson and verify these records against the documents submitted by the salesperson. The verified shortage or verified overage is recorded by the consumer goods cashier in case the verified balance of the route settlement isn't zero.

Missing Documents

As a cashier, you can close the route settlement report when the verified balance is zero. Sometimes due to missing documents, the verified balance of a route settlement report isn't zero.

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Sales administrators can use profile options to decide how unverified payments due to missing documents must be calculated. Sales administrators can set up profile options to control if a missing document can be calculated as missing payment for each payment type.

If the sales administrator sets the profile option to yes, the unverified amount due to missing documents is calculated as missing payments. Also, the verified balance and the verified remaining contain the same value if the profile value is set to yes. In case the profile option is set to no, the unverified amount due to missing documents doesn't impact the verified balance and the verified balance remains zero.

Manage Returnable Containers

Products are often packaged and delivered to customers using reusable containers which aren't sellable. The reusable containers are loaned to the customer. After the sellable products are sold, the reusable containers must be returned.

Associate Returnable Containers with Products

Reusable containers are used to contain more than one sellable product at different points of time. In case a reusable container is used to package more than one sellable product, each sellable product must be associated with the reusable container in an assortment line relationship. All the products and the container which can contain all the products must be associated in a container class relationship. The container class must also be associated with each individual store's account where the product is being shipped. The container class will contain the maximum number of containers which the store can keep at any one point of time.

An assortment record must also contain all the products and the container which can contain them all, this particular assortment must be associated with a store's account record. The assortment lists all the products which the store is associated with.

Return the Empty Containers

After products are sold, the returnable containers must be returned so that the manufacturer can reuse them. To facilitate the return of the containers, account managers must specify the maximum number of containers for each individual container type which the store can keep at one point of time. In case the store has retained more than the maximum allowed number of containers, the store is levied a charge for each extra container retained.

Returnable Containers Example

John Allen, account manager at Vision Corporation wants to associate new returnable container with new products that returnable container can contain. After returnable container is associated with new products, John must associate returnable container with existing account, Seven Corporation.

John must complete these steps to set up the new returnable container and associate it to Seven Corporation's account.

1. Create the returnable container record.
2. Associate the assortment with Seven Corporation's record.
3. Associate the returnable container and the products in an assortment line relationship.
4. Create a container class record to list all the products which can be sold using the new returnable container.
5. Associate the new assortment line relationship and the container class record with Seven Corporation's record.

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Create Returnable Container Record

You must create a product record for a returnable container though a returnable container cannot be sold. As an account manager, here's how you can create returnable container record:

1. Go to Products and click **Create Product**.
2. On the Create Product page, define the new container and deselect the Eligible to Sell check box.
3. Click **Save and Close**.
   The new returnable container record has been created.

   > **Note:** The sales administrator must add the new returnable container to the price book and the product group.

Associate Assortment with Seven Corporation Account Record

You must associate assortment with the account to associate all the products which the account is selling. Here's how you can associate an assortment with the account:

1. Go to Account and select Seven Corporation's record from the list of accounts and select it.
2. Go to the Profile subtab and search for the assortment which you want to associate with Seven Corporation's account record.
3. On the Search and Select page, search and select the assortment and click **OK**.

   > **Note:** On the Search and Select page, you can also create a product and add the new product to the assortment line relationship.

4. On the Profile subtab, click the name of the assortment you just added.
5. Go to the Product Assortment Line subtab and click **Create**.
6. On the Create page, select the stock keeping unit (SKU) which you want to associate with the assortment.
7. Click **Save and Close**.
   The assortment has been associated with Seven Corporation's account record.

Associate the Returnable Container with a Product in an Assortment Line Relationship

You must create assortment line relationships to associate the products which the new returnable container can be sold in and the new returnable container individually. Here's how you can associate the returnable container with a product in an assortment line relationship:

1. Go to Assortment Line Relationships and click **Create**.
2. On the Create page:
   a. Search for the product you want to associate with the new returnable container and select it.

      > **Note:** On the Search and Select page, you can also create a product and add the new product to the assortment line relationship.

   b. Search for the container you just created and select it.
3. Click **Save and Close**.
   The new returnable container has been associated with a product in an assortment line relationship. You can create more assortment line relationships to associate other products which can be sold in the new returnable container.

Create the Container Class Record

You must create the container class record to associate the new returnable container with all the products which the container can be used to be sold in. Here's how you can create the container class record:

1. Go to Container Classes and click **Create**.
2. On the Create page, specify a name for the container class record and click **Save and Continue**.
3. Go to the Products subtab and click **Add**.
4. On the Select and Add page, search for all the products which can be contained in the new returnable container and add them.
5. Click **Done** and then **Save and Close**.

Add the Container Class to Seven Corporation Account Record

The container class record lists all the products which can be contained in the returnable class. Here's how you can add the container class to an account record:

1. Go to Account and select Seven Corporation's record from the list of accounts.
2. Go to the Container Classes subtab and click **Add**.
3. On the Select and Add page, search for the container class you just created and add the container class.
4. Click **Done**.
5. On the Create page, provide the maximum number of bottles which can be allowed to remain with the customer.

   John has created a returnable class, associated the products it can contain, and also associated the container class with Seven Corporation's account.

Manage Merchandising Materials

As sales administrator or marketing manager, manage allocation and delivery of merchandising materials for each route. Merchandising material is a set of materials used for branding, sales promotion, and incentives. You can automate allocation and distribution of merchandising.

Here's how you can manage merchandising materials:

- Associate the merchandising order capture to appointments.

- Link assets or attachments to merchandising locations and manage store displays.

- Allocate, distribute, and track the delivery and display of the material during store visits.

- Automate the allocation quantity for routes using fill, split, and custom allocation methods.

Create and Allocate Merchandising Material

Create merchandising material and allocate the material to the routes.

1. Go to **Merchandising Material > Create**.

   Specify values for the fields such as owner, merchandising material name, product, and allocation dates.
2. Click **Save and Continue** to create a **Draft** merchandising plan.
3. Go to the **Allocation Plan** subtab and click **Create** to create an allocation plan. Select one of the allocation methods:

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- ○ **Fill**: Copies the allocation amount to the published route allocation. For example, when you enter a quantity of 100, this method allocates 100 items to each route.
- ○ **Split**: Splits the allocation amount evenly across the published route allocation. For example, when you enter a quantity of 100 for 10 routes, this method allocates 10 items to each of the 10 routes.
- ○ **Custom**: Lets enter a custom allocation amount for each route. Go to each route and specify the allocation amount.

4. Click **Save and Continue** to create a **Draft** allocation plan.
5. From the Allocation Plan summary, go to the **Routes** tab and click **Add** to add individual routes to an existing allocation plan.

   You can also select from the available routes.
6. From the Allocation Plan summary, click **Actions > Publish**.

   When the allocation process is complete, the allocation plan status changes to **Active**.

   Optionally, click **Copy** to create another plan or **Delete** to remove the plans. You can delete only when the plan is in the draft state.
7. Go to the **Merchandising Material Allocation** subtab to see the allocation details for each route.
8. Click **Save and Close**.

   Your merchandising material allocation is now saved.

Your salesperson can now see the merchandising material for his route from the mobile application.

8 Contract Management

Contracts

Contracts create retail agreements, define terms, conditions, check compliance, reward suppliers, and customers. As sales manager, create contracts between suppliers, customers for selling products. Manage terms, conditions that govern pricing, compliance, accrual, payment, mutual business, and requirements of parties.

As your businesses enter into various contractual agreements with the trading partners, you can optimize all such operations using the contract feature.

Here's how you can create and monitor the contract:

- Create contracts and contract templates from the web and mobile applications.
- Define the benefits, conditions, and terms for your contract.
- Estimate your contract costs for negotiation and fund allocation.
- Manage contract approvals and history.
- Manage partial accrual of the contract benefits for partial compliance.
- Create settlement records automatically for the benefits.
- Associate activities and execute the tasks during the store visit.
- Exclude certain benefits from accrual for custom logic.
- Capture a contract snapshot at critical points in contract negotiation and approval.
- Validate contract terms and verify the success of terms and conditions of a contract.
- Automate compliance and payment settlement schedules.
- Reward the beneficiaries with the contracted benefits.

You can create **Contracts** and **Contract Templates** from the web and mobile applications.

Create Contract Template

Contract template serves as a blueprint using which you can instantly create contracts from the field. You can create multiple contracts quickly from the available contract templates which in turn can improve retail efficiency and speed. Let's see how to create a contract template:

1. Sign in as a sales administrator or marketing manager.
2. On the springboard, go to **Contract Template > Create.**
3. Specify the values for the fields such as the contract template name, renewal, currency, compliance, and settlement details.
4. Click **Save and Close**.

   Contract template is now created.
5. Navigate to the **Clusters** subtab.
6. Search and select a cluster from the **Clusters** list and click **Save**.

   Cluster is now associated with your contract template.

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Your team can use these contract templates to create more contracts.

7. Select **Print Template** from the available list to print the contract templates from mobile applications during store visits.

8. Select **Initiative** values such as contract and promotion.

9. Select **Default Compliance** values such as compliant and not compliant.

   For each benefit, you can indicate the default compliance value. When you don't specify the compliance value for the current compliance period, the contract uses the default compliance value.

10. Select **Exclude From Settlement** when you have a custom settlement logic. When you enable this field, your contract isn't considered for settlement. Use this option selectively, for example, when you want to hold or defer the settlement process of a specific customer. Remember, when you select this option, you skip the contract from the automated settlement process.

    > **Note:** Use this option selectively.

11. Click **Save and Close**.

    Contract template is now created.

12. Go to contracts template summary page, select **Actions > Publish** for a full publish. Or, you can **Actions > Incremental Publish** to publish only the new changes.

    Contract templates are now published to the accounts associated with the clusters.

Publish and Incremental Publish

Improve publishing efficiency with a full **Publish** where you publish all the records or an **Incremental Publish** where you selectively publish the new changes.

- **Incremental Publish:** Use incremental publish when you manage large data for publishing. For example, when you add two thousand new accounts to the clusters or add new clusters to the contract templates, you can opt to publish only those two thousand changes instead of publishing all the records. As you publish only a limited number of records, this option can save time and improve performance.

- **Publish:** Use this publish option for a full publish of all the records. Based on your data size, this option can take longer to publish all your records.

> **Note:** Ensure you republish an object when the object data including the object child data changes. For example, when a new condition is added or the benefit guardrail values for a benefit changes, you must republish the **Contract Template**.

Contract Approval and History

Contract history is the complete copy of the primary details of the contract that includes contract summary, benefits, terms and conditions. Each contract history record is read-only.

You can manage the approvals and history of the contracts:

1. Go to contracts template summary page, select **Actions > Submit Contract**.

   The contract template status changes to **Pending Approval**.

2. Go to **Actions > Approve Contract** to activate the contract or **Actions > Cancel Contract**.

   Once the contract template status changes to **Pending Approval**, a scheduler process job triggers with to manage contract history.

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3. On contracts template summary page, go to **Contract History** subtab to track the history of the contract, benefits, conditions, and terms.

Note: If you want to view the stages through which a contract is progressed, you can view the history on the Contracts History page. These stages can be of revision or approval. You can see multiple records of contract history displayed for a single contract that are sorted in the reverse chronological (latest record at the top) order.

Create Contract from Template

You can instantly create contracts from a ready-made contract template which can help you streamline the entire contract creation process and save you time. When you create a contract from the template, your new contract includes the benefits, terms, conditions, tasks, and activities by default.

Here's how you can create a contract from the available templates while you're on the field.

1. Sign in as a salesperson.
2. On the springboard, go to **Contract > Create.**
3. To create a contract from the template, select the contract template from the available list and specify the contract name and primary account. Alternatively, specify the values for the fields such as contract name, currency, renewal, and settlement details.

   Note: You can create contracts from the templates in the **Active** state.

4. Click **Save and Close**.

   Draft contract is now created.
5. Go to contracts summary page, select **Actions > Approve Contract** to activate the contract.

   Note: You can't edit the contract attributes when the contract is **Active**. However, you can configure a superuser role to edit the contract.

You can also create contracts from **Accounts > Primary Contracts**.

You can now proceed to add the benefits.

Add Benefits

Define the reward for your contract beneficiary when the terms and conditions are met by selecting the benefit type. Let's understand what a benefit is:

- A benefit is a reward that's offered in recognition of sales efforts.

- A benefit is usually in the form of a price discount, monetary gain, or any other form of advantage on satisfying the conditions.

Here's how to add benefits to a contract template or a contract:

1. Sign in as a sales administrator or salesperson.
2. Go to **Benefits > Create**.
3. Specify the values for the fields such as the benefit name and type. Here's a list of some benefits:

   o **Direct Compensation** You reward the beneficiary of the contract a fixed amount on satisfying the conditions of the contract.

- o **Product Discount** You reward the beneficiary with an amount proportional to the quantity of the products sold. The discount can be a total amount, price, or percentage. The current discount model for product discount supports entering attainment in terms of quantity of products sold. However, contracts with product benefits that are based on the net sales of a product are also important to properly account for discounts, returns, and in many markets, account for rapidly changing prices or inflation. The product discount of type percentage supports two types of attainment models. While creating a benefit, customer can select either cases or revenue discount basis. Based on the choice, attainment is either in terms of quantity of products sold or in terms of net sales of a product.
- o **Loyalty Point Benefit** You reward the beneficiary with the points.
- o **Loyalty Level Attainment** You reward the beneficiary with the next loyalty level.

> **Note:** For all the above benefit types, the payment settlement happens across multiple distribution schedules based on your terms. See the sample calculation for contract costs.

4. Based on your benefit type, specify the following details:
   - o Select when the benefit is applicable.
   - o Select if the benefit is negotiable.

     > **Note:** For a negotiable benefit, a salesperson is free to change the benefit amount after negotiating with prospective customers. However, you can set benefit guards such as minimum and maximum values.

   - o Specify the compliance schedule interval and frequency and other details.
   - o Select one of the funding methods from the list; **Bill back** or **Off Invoice**. Remember, the bill back benefit calculates the benefit amount during the entire distribution period and settles the amount at the end of the period.
5. Specify if the beneficiary is eligible for the benefit upon satisfaction of all conditions or any condition.
6. Go to **Guard rails > Create** to specify the benefit guards.

   Select the guard rails by specifying the range of negotiation such as maximum and minimum percentages and values. Save your benefit guards.
7. Go to **Fund Allocations > Create**.

   Specify the values for the fields such as the requested amount, currency type, and select trade fund from the available list. Save your fund allocation.

   > **Note:** Ensure the funds are allocated to each benefit before settlement.

8. Select **Exclude From Accrual** when you have a custom accrual logic. When you enable this field, your benefit isn't considered for accrual. Remember when you select this option, you skip the benefit from the automated accrual process.

   > **Note:** To avoid manual accrual process, don't select this option. Use this option selectively.

9. Go to **Benefit Attainment > Create**.

   Specify the values for the fields such as the distribution index, product, and attainment. Save your benefit attainment.
   - o When you create a benefit, the distribution schedule is created automatically with the distribution index and distribution date. For the direct compensation benefits, the amount and percentage are also populated.

- Record of the number of products sold during a particular distribution period is available here for Product Discount Benefit settlement.
10. Go to **Products > Add** to add or remove the products for the benefit.
11. Based on your conditions, the distribution schedule records the distribution index and distribution date. You can view the same from **Benefit Summary > Distribution Index** subtab.
12. Click **Save and Close**.
13. Your benefit options are now saved.

> **Note:** These settings generate the benefit transaction and resolutions when the benefit terms are met. For more information, see the Compliance and Attainment section.

You can specify payment preference such as check or electronic fund transfer for settlement. Remember to add the lookup and add values for **ORA_ACO_CNTRCT_PAY_PREF**

Calculate Accrual Amount

Direct Compensation

`Accrual Amount = Benefit Amount for the Distribution Index`

Product Discount

Attainment or (Net Sales or Quantity Sold) of the product for a given distribution schedule is entered in benefit attainment.

For Discount Type, Amount

`Accrual Amount = Sum (Discount Amount * Attainment)`

For Discount Type, Price

`Accrual Amount = Sum (( List Price of Product in Price Book of Primary account of Contract - Discount Price) * Attainment)`

For Discount Type, Percentage and Discount Basis, Cases

`Accrual Amount = Sum (Discount Percentage * List Price of Product in Price Book of Primary account of Contract * Attainment)`

For Discount Type, Percentage and Discount Basis, Revenue

`Accrual Amount = Sum (Discount Percentage * Attainment)`

Order Discount

Attainment is entered as the Order Amount for the given distribution index in benefit attainment.

For Discount Type Amount

`Accrual Amount = Sum (Attainment)`

For Discount Type Percentage

`Accrual Amount = Sum (Discount Percentage * Attainment)`

Loyalty Point

`Accrual Points = Benefit Amount Points for the Distribution Index`

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Loyalty Level isn't applicable.

Exclude from Accrual

When you have a custom logic for accrual, here's how you can exclude the accrual from the out-of-the-box accrual process:

- As a sales administrator, you can set a benefit for manual accrual while creating a contract template. Any account contracts that are created from this template can inherit this attribute on the benefit.
- As an account manager or salesperson, you set a benefit for manual accrual when creating the account contract.
- As an implementation consultant, you set this attribute through import or script from an implementation automation perspective. For example, record creation by REST or Import Management.
- You can't modify this field after your contract is active.

Exclude from Settlement

When you have a custom logic for settlement, here's how you can exclude the accrual from the out-of-the-box settlement process:

- As a sales administrator, you can set a contract for manual settlement while creating a contract template. Any account contracts that are created from this template can inherit this attribute.
- As an account manager or salesperson, you set a contract for manual settlement.
- As an implementation consultant, you set this attribute through import or script from an implementation automation perspective. For example, record creation by REST or Import Management.
- You can't modify this field after your contract is active.

Define Terms and Conditions

To be rewarded, the contract beneficiary has to satisfy the contract terms and conditions. Let's see how to define the terms and conditions.

1. On contracts summary page, go to **Terms > Create**.
2. Specify values for the fields such as the terms name and description.
3. Set the owner for the terms.
4. Click **Save and Close**.

   The terms are now saved for a contract template.

   Proceed to add conditions for the benefit.
5. Go to **Conditions > Create**.
6. Specify the values for the fields such as the condition name, type, target parameters, and store-level compliance.
7. Select one of the two condition types:
   - **Manual Conditions:** Indicates that you must fill in both condition attainment and condition compliance history. Condition Attainment represents the attainment of the condition for a specific distribution schedule index (for example, total sales).
   - **Automatic Condition** Indicates that you must fill only the condition attainment.

   Note: You can use the user interface, REST, or web services to fill the details.

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When you don't specify any attainment for the condition,

8. Alternatively, select the condition template from the available list to quickly create the conditions.
9. Alternatively, you can select a KPI library from the available list to quickly generate condition name and UOM by using the existing KPI details
10. For a negotiable condition, you can set condition guards such as minimum and maximum values.
11. Go to **Guard rails > Create** to specify condition the guards.

    Select the guard rails by specifying the range of negotiation such as maximum and minimum percentages and values. Save your condition guards.
12. Click **Save and Close**.

    Conditions are now saved.

    > **Note:** You can override the contract level default compliance by configuring default compliance for condition.

Leverage KPI Library in Contract Conditions

As account manager, you plan KPIs to track account behavior and performance.

- As an account manager, define one or more conditions for each benefit and select a predefined KPI from the KPI library. You can measure the condition compliance KPIs.

- As a marketing manager or administrator, select a predefined KPI from the KPI library at while creating the condition or condition template.

- As a business intelligence analyst, you can see condition report to track and measure the performance.

Contract Activation and Distribution Schedule

Distribution Schedules are not available in contract template. Publishing process won't create distribution schedules. They are not created when benefit is created or updated. Distribution schedules for all benefits are created when we activate a contract.

> **Note:** Ensure that the distribution schedules are created before running the ESS job.

Profile option ORA_ACO_DIST_SCHED_BEN_BATCH_LIMIT is used to control batch size for the ESS job that creates distribution schedules. The default value is 20. Profile option ORA_ACO_CONT_DIST_SCHED_LOG_LEVEL is used to set logging level from 0 to 5 with 5 being the highest. The default value is 0 or not logging.

Estimate Costs

As a salesperson or sales manager or account manager, you can estimate the contract costs for each benefit and contract. This estimation guides you with negotiation and fund allocation. You can see this forecast value from the summary pages of contract and benefit. Based on your conditions, terms, and attainment, your contract value is estimated.

How is a Contract Value Calculated?

- Direct Compensation

  Under direct compensation, the benefit value is the same as the benefit amount.

  benefit value = benefit amount.

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- Product Discount Benefit

For each benefit, the value is calculated based on a math formula when benefits are compliant for the compliance period. See the following use case and calculation of a benefit value:

Use Case	Sample Calculation
Let's consider a contract (c1) with two months duration with two products: • List Price of product in price book of primary account of contract for product A is 100 dollars. • List Price of product in price book of primary account of contract for product B is 200 dollars. Let's look at the benefit type and terms: • Benefit type is product discount and discount type is Percentage. • Discount is 10 percentage with both products to be added. Let's look at the forecast attainment details: • For product A and account, the projection in sales is 50 units. • For product B and account, the projection in sales is 40 units.	`Total benefit value = sum (Discount Percentage * List Price of Product in Price Book of Primary account of Contract * forecast attainment * contract length in a month).` • 0.01*100*50*2 = 100 dollars • 0.01*200*40*2 = 160 dollars • Total value (c1)= **260 dollars**

Check Compliance and Attainment

Contracts have an inbuilt mechanism to process the benefit settlement by checking the benefit attainment and compliance across distribution periods. As a salesperson, you can verify the contract terms, compliance, condition attainments, benefit accruals, and eligible values. On successful fulfillment of contract terms, you can schedule the payment settlement.

You can verify benefit accruals and attainment from the following compliance checkpoints and scheduler jobs.

Compliance Checkpoints

- Benefit Attainment

  As and when the benefit transaction happens, the benefit attainment is created with distribution index, product, and attainment quantity information. You can view the details from **Benefit Summary > Benefit Attainment** subtab.

- Condition Attainment

  As and when one or all conditions are compliant, the condition attainment is created. You can view the details from **Condition Summary > Condition Attainment** subtab.

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- Benefit Transactions

  As and when the benefit is compliant, the benefit transaction is created with accrual amount and date. You can view the benefit transaction details from **Benefit Summary > Benefit Transaction** subtab.

- Benefit Resolutions

  As and when the benefit settlement succeeds, the resolution is created with benefit amount, date, and other information. You can view the resolutions from **Benefit Summary > Resolutions** subtab. When you select **Exclude from Accrual**, the benefit isn't considered for accrual and resolution.

Enterprise Scheduler Service Jobs

You can run the following jobs to verify the compliance history and generate the benefit settlement.

- Compliance History Job
- Generate Benefit Settlement Job

Note: You can configure the superuser to override the latest benefit compliance history.

For more information about these jobs, see the Enterprise Scheduler Service (ESS) jobs section of Consumer Goods Getting Started Guide.

Contract Forecast

During the contract negotiation, sales representative, sales manager, and account manager need to know the estimated cost of contract and each benefit to guide them through the negotiation and fund allocation. It can be initiated by using the Calculate Forecast action on the Contract Details Page. After the button is clicked, an ESS job runs in the background. After it finishes, the Contract Value field is updated with the latest value. For each benefit, its value is calculated based on Math formula. Assuming that benefits are compliant for all compliance periods. All benefit values are rolled up to one single contract value.

The Math formulae to calculate the benefit value for each type of benefit are:

```
Direct Compensation:
Benefit value = benefit amount


Loyalty Point:
Benefit value = benefit amount


Order Discount:
Discount Type is Amount.
Benefit Value = sum ( Forecast Number of orders * contract length in month * Discount Amount)
Discount Type is Percentage.
Benefit Value = sum ( forecast attainment * contract length in month * Discount Percentage)


 Product Discount:
 Discount Type is Amount.
 Benefit Value = sum (discount amount * forecast attainment * contract length in month)
 Discount Type is Price.
 Benefit Value = sum ((Discount Price - List Price of Product in Price Book of Primary account of Contract)
 * forecast attainment * contract
length in month
 Discount Type is Percentage.
 Benefit Value = sum (Discount Percentage * List Price of Product in Price Book of Primary account of
 Contract * forecast attainment * contract length in month)


 For example, consider Product A (List price 100$ in pricebook) and Product B (List Price 200$ in
 pricebook). Consider a Contract c1 with length (end date-start date) as 2 months.
```

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```
Let's say this contract has a benefit b1 of type Product Discount, with Discount Type as Percentage and
discount percentage as 10%. Both the products A and B are added to the benefit.

For product A and account if the customer has entered its forecast attainment (projection in sales) as 50
units, and for product B as 40 units.

Total Benefit Value = sum (Discount Percentage * List Price of Product in Price Book of Primary account of
Contract * forecast attainment * contract length in month)

= 0.01*100*50*2+ 0.01*200*40*2

=100+160

=260$
```

ORA_ACO_FORECAST_BEN_BATCH_LIMIT profile option can be used to control the batch size for the ESS job. Default Value is 1000. ORA_ACO_CONT_FORECAST_LOG_LEVEL profile option can be used to enable logging for the ESS job from 0 to 5. Default Value is 0.

Forecast Attainment

Forecast attainment is the projected attainment to be entered by the customer for projecting the benefit. It is mostly in terms of sales of a product account combination.

You can enter it in 2 ways:

- For each account and each product, the external integration will populate the forecast monthly quantity.
- For each account there is a default forecast monthly quantity that will be used for any products that were not specifically in the forecast. It is unlikely that you will populate forecast attainment for account and product. You will only populate forecast attainment for top products for each account.

Case 1: Create Forecast Attainment record

Expose the Forecast Attainment object as related object under Account in layout. Also expose Default Forecast Attainment field in Account layout.

Create form of the Forecast Attainment contains:

Account: The account to which the product is associated.

Product: The product for which the monthly forecast attainment is to be recorded.

Attainment: The monthly forecast attainment.

Type: Indicates whether this is for order discount or product discount. If not entered, product discount is considered.

Case 2: Set Default Forecast Attainment in Account

1. Go to Account, set **Default Forecast Attainment**.
2. Go to Forecast Attainment subtab, click **Create**.

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9 Routes Settlement

Manage Distribution Centers and Routes

As a sales administrator, you can manage the distribution centers to assign and reassign routes and salesperson to them depending on your requirement.

> **Note:** A distribution center can have multiple routes and resources assigned to it. A route can have multiple resources assigned to it as well. However, the salesperson assigned to a route must belong to the distribution center of that route.

Create Distribution Center and Assign Resource

As a sales administrator, you can manage the distribution centers and assign the routes to salesperson.

1. Click **Distribution Centers** on the Springboard and select **Create**.
2. Enter the values for fields such as distribution center contact details, and address.
3. Click **Save and Close**.

   A new distribution center record is created.

To assign a resource to the distribution center you created:

1. Navigate to the **Resources** subtab of the newly created distribution center record.
2. Click **Add** to assign a resource from an existing list of resources and select the resource.

   The selected resource is added to the distribution center.

1. Navigate to the Route subtab of the newly created distribution center record.
2. Select a route and click **Add** to assign an existing route number from the list.

Create Route and Assign Resource

A route is created and assigned resources and associated with a distribution center. Assortment can be associated with a route for the mobile application to identify **sellable** and **unsellable** products in its route inventory.

You can optionally specify a product category for a route. The salesperson views and sells the products of the specified product category.

1. Click **Routes** on the Springboard and click **Create**.
2. Enter the values for fields such as number, territory manager, and distribution center.
3. Click **Save and Close**.

   A new record is created.

To assign a resource to the route you created:

1. Click **Route Allocation**.
2. Select a route from the Routes Landing page. On the Route Summary page, select from existing routes.

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> **Note:** The selected route and resource must belong to the same distribution center created. Select the resource as **Primary** to ensure that route data is synced between the web and mobile application. Each route can have a single resource assigned as Primary and this same resource must sign in to the mobile application.

3. Select a resource from the drop-down list to assign a resource to a route.
4. Click **Save and Close**.

   The resource has been assigned to the route.

View Route History

Salesperson check in to the route when they leave the distribution center at the beginning of the day. Upon returning to the distribution center after the completion of their tasks, they check out from the route.

Check in and check out histories are recorded in the consumer goods mobile application. To view the check in and check out histories, go to the route object and select the check in and check out History subtab.

View Assignment History

You can check which vehicles and salesperson have been assigned to routes on a day to day basis.

On the route close, route assignment history is recorded in the consumer goods mobile application. To view the route assignment history, go to the route object and select the assignment History.

Settle Routes

As a sales representative, you can plan the product inventory, deliver the goods from the distribution centers to the stores, and organize this movement in routes with the direct store delivery solution.

At the end of the day a settlement process is performed to verify all payments and supporting documentation for all transactions in detail. After a route has finished all its visits it goes through the settlement process. During the settlement process, the sales representatives, the route inventory auditors and the cashiers review the returned inventory and other supporting documentation to catch any discrepancies.

For more information regarding the route settlement process, see the Oracle Customer Experience Cloud Using Consumer Goods Mobile.

Using the Consumer Goods Web Application, you can view the following three route settlement related documents:

- Route Inventory Transaction Report
- Route Inventory Reload Report
- Route Settlement Report

Route Inventory Transactions Report

The route inventory audit reports are created in the mobile application and you can view them in the web application. To view individual route inventory audit report, go to the Route Inventory Audit Report subtab of a route object. For more information on route settlement and generating the route settlement report, see the Oracle Customer Experience Cloud Using Consumer Goods Mobile guide.

Route Inventory Reload Report

For some routes it may be necessary to return to the distribution center to reload or unload the inventory before they continue the deliveries. The route inventory reload reports are created in the mobile application and you can view them in the web application. To view individual route inventory reload report, go to the Route Inventory Reload Report subtab of a route object. For more information on route settlement and generating the route settlement report, see the Oracle Customer Experience Cloud Using Consumer Goods Mobile guide.

Route Settlement Report

The route settlement reports are created in the mobile application and you can view them in the web application. To view each individual route settlement report, go to the Route Settlement Report subtab of a route object. For more information on route settlement and generating the route settlement report, see the Oracle Customer Experience Cloud Using Consumer Goods Mobile guide.

Print Route Settlement Report

As consumer goods cashiers, you can print the route settlement report at the end of the route settlement process. The sales administrator can also print route settlement reports.

The print output of the route settlement report contains all the sections of the route settlement report. Along with all the sections, each page of the print output also includes a header and a footer.

- The page header includes the following information:

  - Name of the company.
  - Name of the distribution center.
  - Address of the distribution center.
  - Phone number of the distribution center

- The page footer includes the following information:

  - Space for the salesperson to sign.
  - Space for the consumer goods cashier to sign.

To print the route settlement report:

1. Sign in as the consumer goods cashier or the sales administrator.
2. Navigate to Route and select the route for which you want to print the route settlement report.
3. Navigate to the Route Settlement Report subtab and select the report which you want to print.
4. On the Summary tab of the route settlement report, click **Print**.

   In a new tab, the Print Route Settlement Dashboard in the Oracle Business Intelligence Application opens.
5. On the Print Route Settlement Dashboard, complete the following steps:

   a. Click **Page Options**.
   b. Select Print and click **Printable HTML**.

      The printable version of the route settlement report opens in a new tab.

> **Note:** If the route settlement report has been updated since the previous print, refresh the Print Route Settlement Dashboard before the next print.

6. Use the print option on your browser to print the report.

Work with the Route Settlement Report

Clare Furey is a cashier at Vision Corporation and wants to verify and close a route settlement report. The following example helps Clare navigate through the route settlement report and close it.

> **Note:** The sales administrator of Vision Corporation has set the missing document policy for every document type as Yes. Setting the missing document policy as Yes indicates that a missing document will be considered as a missing payment.

View the Route Settlement Report

Clare must perform the following steps to view the route settlement report:

1. Sign in using the consumer goods cashier role.
2. Navigate to Routes and select the route for which the route settlement report has been submitted.
3. Navigate to the Route Settlement Report subtab on the route summary page.
4. Select the route settlement which has been submitted.

   > **Note:** A route can have multiple route settlement reports.

5. Review the information provided by the sales representative about the amount received from the various types of transactions.

   Clare must now verify the details provided the sales representative.

Verify the Route Settlement Report

Clare must complete the following steps to verify the route settlement:

1. Verify the bills and coins received on the summary subtab of the route settlement report.
2. Navigate to the Bank Deposits subtab and view all the bank deposit transactions recorded for this route settlement report.
3. Navigate to the Documents subtab and perform the following activities:

   o Verify the documents for the following types of transactions:

      - Bank deposits
      - Checks
      - Credits used
      - Store credits used
      - Proof of purchase
      - Electronic transfers
      - Credit cards

- Mark the missing documents and provide individual reasons for each missing document of the different types of transactions.

4. Navigate to the Coupons subtab and verify the quantity of coupons and the amount received from coupons on the route.

5. Navigate to the Expenses subtab and perform the following activities:

   - Verify the types of expenses incurred during the route and the amount spent on expenses.

   - Mark the expense receipts which are missing and verify the amount as zero.

6. Navigate to the Summary subtab and review the Verified Balance. If the Verified Balance isn't zero, the value of the Verified Balance field must be recorded as verified shortage or verified overage on the Miscellaneous section.

7. Close the route settlement report.

   Note: The route settlement report is read-only after it has been closed.

   Clare has closed the route settlement report as the verified balance of the report is zero. Clare cannot close the route settlement report if the unverified amount due to missing documents isn't calculated as shortage.

Related Topics
   - Settle Payments and Close Routes

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10 Surveys

Manage Surveys

As sales administrator or marketing manager, conduct survey for store visit. Survey questionnaire finds information such as sales volume of newly introduced product or changes in sales if product is modified in shape, size, or quantity.

Create questions from survey template object, which you can either publish against cluster or add to account from Survey subtab of Accounts. You can add multiple survey templates with different question types and render conditions to account. Render conditions allow to render questions based on previously answered questions.

These questions can be answered by selecting the particular account having an in-progress activity and selecting surveys from the store visit task list. It will go to Survey-List page that lists all the survey types to be answered by that account. Click a particular survey type to navigate to the survey-details page that has all questions and answer values displayed based on render conditions. As a sales administrator, you can take the survey and click **Submit** to post the answers to the UI server through REST. These answers are visible from the Surveys subtab of that particular survey template.

As a user, you can configure survey questions for a survey template. While configuring questions, you can specify page number, question number, question, answer, and answer type. From the survey template, navigate to **Trial Survey > Survey questions subtab > Different question types**.

You can use two types of surveys.

- Account Survey
- Promotion Compliance Audit Survey

Account Survey

Use the account surveys to run surveys within an account context for a variety of purposes, such as measuring product performance or collecting customer feedback. You can also perform account surveys to gauge a product performance at a retail store, placement, and demand. Use the Assessments subtab to view the survey responses.

Promotion Compliance Audit Survey

Use the promotion compliance audit surveys to ensure effective promotion execution and compliance at the retail store.

You can use the data from these surveys to modify and propel your promotional strategy across your stores. For more information on enabling and configuring surveys and survey templates, see the Getting Started with Consumer Goods Implementation.

Create and Associate Survey Templates

As a salesperson, you create survey templates in the web application using the same survey template name that you created in the Intelligent Advisor hub.

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To create survey template record:

1. Select **Survey Template** on the springboard.
2. Click **Create** on the Survey Template page and create a record of the template using the same name as used in the hub.

Associate Surveys to Accounts

You associate surveys to accounts depending on your business requirement after you create a survey.

1. Click **Account** on the springboard.
2. Select an account and click the Surveys subtab.
3. Click **Create** and edit the survey details such as start date, end date, and repeat interval.

   The repeat attribute for survey execution has several values such as daily, weekly, monthly, yearly, quarterly and none. Repeat interval is the manually entered value. If repeat is set to none, then the repeat interval isn't applicable and the survey is executed once. For example, if the repeat value is weekly and repeat interval value selected is two, then this survey is run twice every week.

   Note: You can use the repeat and repeat interval options to suit your business requirements.

4. Click **Save**.

Associate Surveys to Promotions

To associate surveys to promotions:

1. Click **Promotion** on the springboard.
2. Select a promotion and click the Surveys subtab.
3. Click **Create** and edit the survey details such as start date, end date, and repeat interval.
4. Click **Save**.

Note: The application allows a single survey response to be saved for an associated survey on any given day.

Manage Survey Templates

As sales administrator or marketing manager, conduct survey for store visit. Survey questionnaire finds information such as sales volume of newly introduced product or changes in sales if product is modified in shape, size, or quantity.

Create questions from survey template object, which you can either publish against cluster or add to account from Survey subtab of Accounts. You can add multiple survey templates with different question types and render conditions to account. Render conditions allow to render questions based on previously answered questions.

Here's how you can create and manage the survey templates for operational efficiency.

- Manage the surveys across multiple accounts at scale.
- Associate the survey template to cluster for better segmentation and downstream activities.
- Improve the pace and efficiency of your retail operations.

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Here's how you can associate the Survey Templates with Clusters:

- Add survey name, repeat interval, and dates.

- Associate and publish survey template with clusters.

Create Survey Templates

As a marketing manager or sales administrator, here's how you can create a Survey Template:

1. On the springboard, go to **Survey Template > Create.**
2. Specify the values for the fields such as the survey template name, policy model, dates, and interval details.
3. Click **Save and Close** to create a draft survey template.

Associate Survey Templates with Clusters

To associate a Survey Template with clusters:

1. On the survey template summary page, go to **Clusters** subtab.
2. Search and select a cluster from the list and click **Save**.

   Cluster is now associated with your survey template.

Publish Survey Templates

You can publish, copy, revise, and delete the Survey Template.

Publish Survey Template

1. On the survey template summary page, click **Actions > Publish**.

   The Survey Template publishing schedule process starts.

   When the schedule process is complete, the Survey Template status changes to **Active**.
2. Go to **Cluster > Account > Account Surveys** to see the survey template details of the account.

Copy or Revise Survey Template

- On the survey template summary page, click **Actions > Copy**.

   The Survey Template is now copied.

- On the survey template summary page, click **Actions > Revise or Deactivate**.

   The Survey Template is now revised.

   Remember, you can deactivate or revise only an active Survey Template.

Enable Surveys and Tasks for Objects

As a sales administrator, you can now create executable surveys and tasks for your custom objects. Let's see what you can do with the objects for operational efficiency.

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- Create an object to suit your business requirement.

- Assign a survey template to a defined task in any object.

- Publish the parent object tasks to one or more accounts and clusters.

- Complete the survey tasks during the store visits and field operations.

- Improve the pace and efficiency of your retail operations.

Based on your configuration and settings, salesperson and field staff can complete the survey and tasks during their store visit.

Here's how you can create and manage the survey templates for operational efficiency.

Prerequisites

Before you work with any custom objects, ensure you complete the following settings:

- Create an object that you need, for example, **Brand Information**.

- Map the object to clusters. Ensure you add a filter to work with clusters in **Active** status.

- Create a publish button to trigger the scheduled process job.

- Create a DCL field in the **Activities**.

- Go to Application Composer > Standard Objects, > Activity > Fields.

Create Object and Tasks

As a marketing manager or sales administrator, you can perform the following tasks:

- Create an object, for example, **Brand Information**.

- Add tasks and surveys as appointments.

- Associate object to clusters and its accounts. When you use clusters, you don't need to manually associate surveys to individual accounts .

- Complete the appointments during store visits.

Let's see how you create a task for **Brand Information**:

1. Go to **Brand Information > Create.**
2. Specify the values for the fields such as the name, owner, start dates, and end dates.
3. Click **Save and Close** to create a draft survey template.
4. On the brand information summary page, go to the **Clusters** subtab, search and select a cluster. Click **Save**

   Survey is now associated with all accounts in that cluster.

   > **Note:** You can still associate surveys to individual accounts.

5. Go to **Activities > Create Task** to create tasks for the object.
6. Specify the values for the fields such as the task name, owner, priority, start and end dates, primary contact, and category.
7. On the brand information summary page, click **Publish** to start publishing the objective tasks to clusters.

   When the scheduled process is complete, the objective tasks are created in all the accounts of the cluster.

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8. Go to **Account > Objective Tasks** to verify the associated information such as **Target Object Name** and **Target Name.**

9. Click **Save and Close** to convert objective tasks to appointments.

    Now, you can proceed to create appointments.

10. Go to **Account > Activities > Create Appointment**.

11. Specify the values for the fields such as the subject, type, start and end dates, recurrence, and reminder.

    > **Note:** Select **Store Visit, Store Visit Type,** and **Route**

12. Click **Save and Close** to download appointment tasks as store visit tasks.

    When the scheduled process is complete, the associated tasks and surveys are populated as appointments.

Your salesperson can complete these surveys and tasks during their store visits.

11 Shopping Cart

Work with Shopping Cart and Shopping Cart Template

Using your consumer goods web application, you can work with shopping cart and the shopping cart templates.

Add a list of products to your shopping cart to track products and the promotions applied. Add products to a shopping cart in the following ways:

- Add products directly to the shopping cart.
- Add all products in a promotion to the shopping cart.
- Add all products in the shopping cart template to the shopping cart.

Add Products to the Shopping Cart

Each account can have a single shopping cart and you can add products and specify the desired quantities before you create an order. You can also use the empty cart option to delete all the products in the cart and the clean cart option to delete products with no specified quantity from the cart. To add products to the shopping cart:

1. Click Accounts icon and select an account.
2. Select the Profile subtab and click the shopping cart link.

   > **Note:** If you don't see the shopping cart link in the profile subtab of accounts, click **Create Shopping Cart** in the overflow menu to enable the link.

3. Click **Create** to add products to the cart.
4. Click **Save** after you're done.

   You must click **Save** after adding the products to see the shopping cart populated with the products.
5. Click **Save and Close**.

Add Products from the Shopping Cart Template

As most of the store visits are repeat visits and each customer typically has a predictable purchase pattern based on their order history, Consumer Goods solution requires an efficient way to capture customer orders. Shopping cart templates may help speed up the order taking process and drive more sales. They provide customers targeted shopping carts. A shopping cart template includes a list of products with suggested quantities. The shopping cart templates enables you to have a predefined set of products and quantities that customer is most probable to buy.

There are two types of shopping cart templates and each account can select one of the two shopping cart templates.

- Sales History Template: This template includes all the products depending on historical purchase data.
- Last Order Template: This template includes products from the last order made from the account.

To set up the shopping cart template:

1. Click **Accounts** and select an account.
2. Click Profile subtab and select from **Sales History** and **Last Order** for the shopping cart template field.

3. Click **Save and Close**.

   Ensure that you have set the correct values for the profile options for the **shopping cart template** to enable the calculation of the template. For more information on enabling the calculation of the shopping cart template, see the Getting Started with Consumer Goods Implementation Guide.

   To schedule an Enterprise Scheduler Service job for the shopping cart template to calculate and populate the product quantities and relevant fields, see the Getting Started with Consumer Goods Implementation guide.

   To view the populated shopping cart template after running the jobs, navigate to the shopping cart template subtab from an account record.

To add products to the shopping cart using the template:

1. Click Accounts and select an account.
2. Select the Profile subtab and click the shopping cart link.
3. Click **Add from Template** in the Actions menu to add the predefined products and quantities from the template that you configured earlier.
4. Click **Save**.

   > **Note:** You must click **Save** after adding from the template to save your changes.

5. Click **Save and Close**.

Add Products from a Promotion to the Shopping Cart

You can add products from a promotion to the shopping cart.

You must sign in using account manager, field sales representative, or sales manager role to add promotions to shopping carts. When you add a promotion to a cart, all the products in that promotion are added to the cart.

To add a promotion to your cart:

1. On the springboard, click **Accounts**.
2. Click a link to edit an account.
3. Select the Promotion subtab. Select the promotion and click **Add to Cart** and click **Save**.
4. Select the Profile subtab and select the link to the shopping cart.
5. Select the promotions subtab and edit the quantities specific to the promotion type.
6. Click **Save and Close**.

   Repeat steps three through six to add multiple promotions to a cart.

> **Note:** You must click **Save** after adding the promotions to the cart for the changes to reflect in the cart.

Extensibility for Shopping Cart Template Header

Additional attributes can be copied during publishing process from the shopping cart template plan to the shopping cart template header.

Here's how you can configure extensibility for the publishing operation:

1. Create a record under Object Mapping.

   The object mapping record represents an operation that supports extensibility.

2. Select **Shopping Cart Template Plan to Shopping Cart Template Header** from the fixed choice list.
3. After the object mapping is created, you must create attribute mapping records under Object Mapping.
4. Populate the dynamic choice list fields, source object attribute and the target object attribute on the Create page of the attribute mapping.
5. Create attribute mappings to map the Shopping Cart Template Plan attributes to the Shopping Cart Template Header attributes.

   You can create any number of mappings that you require.
6. Activate object mapping after the attribute mapping is created.

   Only active object mappings are published.
7. Deactivate the object mapping if you don't want extensibility for the publishing operation.

Here's the list of rules to prevent mapping errors during attribute mapping:

1. Attributes being mapped must be of compatible data types such as number field mapped to number field.
2. The ID field and not the name field, must be mapped while mapping dynamic choice lists.
3. The target object of the dynamic choice list for source object attribute and target object attribute must be the same.
4. The route dynamic choice list must be mapped to a route dynamic choice list and not to a route allocation dynamic choice list.
5. In the target object attribute, ensure that fields beginning with __ORACO__ are not mapped.
6. The fixed choice list type for the source object attribute and the target object attribute must be the same while mapping fixed choice lists.

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12 Budgets and Claims

Manage Budgets

As marketing managers, you create budgets to allocate funds to drive brand performance. You can allocate a single budget for multiple partners and fund each partner with their brand activities.

Type of Budgets

Create one of the following types of budgets:

Fixed Budgets Indicates the budget amount allocation at the time of creating the budget.

Accrual Budgets Indicates the budget amount that varies per the accrual rules.

Rules for Accrual Budgets

Rules help you calculate the allocation amount for accrual budget. The accrual rules don't apply to the fixed budget.

The accrual rules calculate the budget amount based on the performance of the products or assortments. You can set the accrual rules for:

- Product groups
- Assortment plans
- Individual products

Allocate funds one of the following budget ways.

Basis Type	Amount Allocation Method
Cases	Indicates the allocation in amount.
Revenue	Indicates the allocation in percentage.

Allocate Budget

As marketing managers, you can distribute a budget among several partners. You allocate the budget and the amount or the percentage of the budget for each partner based on your business requirements.

After the budget allocation, generate the child records to track each allocation individually and use each fund record to track the budget amount.

Calculate Budgets

Use the following fields to track the amount for a budget:

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Field	Calculation
Balance	Indicates the total amount or total funds in the active status.
Projected	Indicates the total associated funds in active and in draft status.
Allocated	Indicates the sum of amount allocated to all the child funds.
Unallocated	Indicates the total amount that's not allocated.
Spent	Indicates the total amount paid to partners for allocated child funds.
Unspent	Indicates the total amount spent.

Manage Funds

As marketing managers, you create funds or generate multiple fund records associated with a parent budget. Funds are of two types: fixed funds and accrual funds.

Funds generated from parent budget, inherit all relevant fields provided in the parent budget except for the fund value. The funds value is inherited from the value allocated to the fund in the Partners subtab of the parent budget.

When funds aren't associated with parent budgets, you define such funds independently. Also, set accrual rules for such independent accrual funds.

Accrual Funds

You can't change the value of accrual funds. Remember, the accrual fund is calculated using the rules of the parent budget, quantity of the products shipped, the revenue, and the fund duration. The duration of an accrual fund can't start before the parent budget or go beyond the partner budget end date.

Allocate Funds

You can allocation funds to one or more promotions. Associate each allocated promotion with a fund allocation record and track the fund allocation record individually.

Use Budgets and Funds Example

As a marketing manager, you create a fixed budget and an accrual budget. Along with creating the budgets, you can generate funds for the fixed budget and create a child fund for the accrual budget.

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This example illustrates how you can:

1. Create a fixed budget and generate its child funds
2. Create an accrual budget and create its child fund
3. Create a fund

Note: As marketing manager, enable your account managers, who approve the promotion, with permission to edit the budget or the fund or the associated fund allocation.

Create Fixed Budget

Complete the following steps to create a fixed budget and generate its funds:

1. Go to the **Budgets > Create**.
2. On the Create Budget page, specify the following information:
   - Select the type as fixed budget.
   - Select the budget category.

   Note: Based on the budget type, specify the required values. For example, provide the initial amount for a fixed budget but not for an accrual budget.

3. Click **Save and Continue** and go to the Account subtab.
4. On the Accounts subtab and perform the following steps:
   a. Click **Add** to search for the account to which you want to allocate funds.
   b. Search and select the account to which you want to allocate funds and click **Done**.
   c. Provide the amount or the percentage of the budget which you want provide each partner as funds.
   d. Click **Generate Funds** after you have added all the account and allocated the fund amount or the fund percentage for each account.

      Note: When you click **Generate Funds**, you create child funds for each partner. Create independent funds outside your parent budget.

5. Click **Save and Close**.
   You created the fixed budget and generated its child funds.

Create Accrual Budget

Complete the following steps to create an accrual budget and create its child fund:

1. Go to the **Budgets > Create**.
2. On the Create Budget page, specify the following information:
   - Select the type as accrual budget.
   - Select the budget category.
   - Select the basis for the budget.

      Note: The two basis types are:
      - Cases: The allocation amount is provided in amount.
      - Revenue: The allocation amount is provided in percentage.

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3. Click **Save and Continue** and navigate to the Accrual Rules subtab.
4. On the Accrual Rule subtab, click **Create**.
5. On the Create page, specify the following information and click **Save and Close**.

    o Amount for the accrual rule.

    o Start date and the end date for the accrual rule.

6. On the Accrual Rules subtab, select the accrual rule you just created. Complete the following steps to add a product or multiple products:

    o To add a product:

        i. Navigate to the Product subtab and click **Add**.
        ii. Search and select the product you want to add and click **Done**.

    o To add an assortment:

        i. Navigate to the Assortments subtab and click **Add**.
        ii. Search and select the assortment you want to add and click **Done**.

        All the products associated with the assortment are now associated with the accrual rule.

    o To add a product group:

        i. Navigate to the Product Groups subtab and click **Add**.
        ii. Search and select the product group you want to add and click **Done**.

        All the products associated with the product group are now associated with the accrual rule.

7. Click **Save and Close**.
8. Navigate to the Funds subtab and perform the following steps:

    a. Click **Create**.
    b. On the Create Funds page, specify the fund information.
    c. Click **Save and Close**.

9. Click **Save and Close**.

    You created the accrual budget and created its child fund.

Create a Fund

Complete the following steps to create a fund:

1. Go to the **Budgets > Create**.
2. On the Create Budget page, specify the following information:

    o Select the type as fixed fund or accrual fund.

    o Specify a Parent budget for the fund.

    o Specify the Allocation Deadline.

    o Specify the Claim Deadline.

3. On the Summary subtab, complete the following steps:

    o From the Accounts list, select **Search** to search the partner you want to associate with the fund.

    o Click **OK**.

4. Select the fund status and amount and other details.

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5. Click **Save and Close**.

You created a fund.

Manage Claims

You can create claims for trade activity expenses and settle the claims from fund allocations.

You can do the following with claims using the Consumer Goods web application:

- Claim creation
- Claim resolution

Claim Creation

As partner sales manager, partner sales administrator, and partner sales representative roles, you can create a claim.

1. Go to Claims > **Create**

Specify the required details such as account and currency

2. Click **Save and Continue** to save it and continue adding claim items.

After clicking **Save and Continue**, you will be navigated to the Claims Summary page where you can view the details and add attachments. You must select the Claims Items subtab to view and create claim items.

To create claim items:

    a. Navigate to the Claims Summary page and select the Claim Items subtab.

    b. Click **Create** to create claim items.

    c. Click **Save and Close**.

A claim can be in the draft, submitted, in progress, resolved, closed or withdrawn status. On creation, the claim is in the draft status. You can delete the claims only in the draft status. When the claim is in the submit status, you can resolve the claim. When the claim amount is equal to the sum of all resolution amounts in the Approved status, the status of the claim changes to **Resolved**.

Claim Resolution

After a draft claim is submitted, the account manager, channel operations manager, or sales administrator can create resolution records for the claim. You can offer two types of resolutions:

- **Funded Payment**: Pay the claim amount to the customers from an approved fund allocation. Associate the funded payment resolutions to the approved fund allocations.
- **Reject**: Reject the claim amount.

To create a claim resolution:

1. Sign in as the account manager and go to an open claim.

An open claim is in the submitted or in-progress status.

2. Click the resolutions subtab.

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3. Click **Create** and enter values for fields such as amount and resolution type and click **Save and Close**.
4. On the Resolutions subtab, select the resolution you created and make updates, if any.

   If you select a funded payment as the resolution type, you must select an MDF Request from the drop-down list.
5. Click **Submit**.

   Funded payment resolution is backed by the MDF Claim object in your sales application using Partner Relationship Management for Channel Partners. The status and approval of funded payment resolution is determined by the status and approval of the underlying MDF claim record.

You must approve a claim resolution to set the claim to resolved. You can create your own approval flow or perform the following steps for an OOTB approval:

1. Sign in as the account manager.
2. Click the Claims and click the claim record to edit.
3. Select the Resolution record from the Resolution subtab and click **Actions** and **Approve** to change the status to Approved.

   When the deduction amount is equal to the sum of all resolution amounts in the Approved status, the deduction status changes to resolved.
4. Select **Submit** and **Save**.

Manage Deductions

As account managers, you can create deductions for trade activity expenses and resolve the deductions with the fund allocations.

Here's how you can work with deductions:

- Deduction creation
- Deduction resolution

Deduction Creation

As an account manager, you can create deductions if you use the new budget and fund model. For MDF, your partner sales manager, partner sales administrator, and salesperson can create a deduction.

1. Select the Deductions icon from the springboard.
2. Select **Create** and select the mandatory details such as account, reason code and currency from the drop-down lists.
3. Click **Save and Close** to save it or **Save and Continue** to continue editing the created deduction.

   After clicking **Save and Continue**, you will be navigated to the Deductions Summary page where you can view the details and add attachments.

A deduction can be in the draft, submitted, in progress, resolved, closed or withdrawn status. On creation, the deduction is in the draft status and you can delete a deduction only in a draft status. When you submit the deduction, you can resolve a deduction resolution. When the deduction amount is equal to the sum of all resolution amounts in the Approved status, the status of the deduction is changed to resolved.

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Deduction Resolution

After you submit a deduction, the deduction is open for a resolution. A deduction can have multiple resolutions. You can choose from the four deduction resolution types:

- Funded Payment: Pay the deduction amount to the customers from an existing fund allocations.

- Unfunded Payment: Pay the deduction amount from outside the existing fund allocations but was approved as a valid expense.

- Charge back: Reject the portion of the deduction amount.

- Write-Off: This portion of the deduction amount isn't sourced from any existing fund allocations.

1. Sign in as the account manager. Navigate to an open deduction.

   An open deduction is a deduction that's in the submitted or in-progress status.
2. Click the resolutions subtab.
3. Click **Create** and enter values for fields such as amount and resolution type and click **Save and Close**.
4. On the Resolutions section, select the resolution you created and make updates, if any.

   If you select funded payment as the resolution type, you must select an MDF Request from the drop-down list.
5. Click **Submit**.

   Funded payment resolution is backed by the MDF Claim object in Oracle CX Sales Partner Relationship Management for Channel Managers. The status and approval of funded payment resolutions is determined by the status and approval of the underlying MDF claim record.

You must approve a deduction resolution to set the deduction to resolved. You can create your own approval flow or perform the following steps for an OOTB approval:

1. Click the deductions icon and click the deduction record to edit.
2. Select the Resolution record from the Resolution subtab and click **Actions** > **Approve** to change the status to Approved.

   When the deduction amount is equal to the sum of all approved resolution amounts, the deduction status changes to resolved.
3. Select **Submit** and **Save**.

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13 Trade Promotions

Manage Promotions

Promotions enable marketing managers and account managers to manage trade promotions and advanced pricing.

When you specify product category for a promotion, you can add products from that product category to the promotion.

You can leverage four types of promotions in the consumer goods application:

- Fixed discount
- Fixed combination
- Dynamic combination
- Volume discount

Additionally, you can set following discount limits for each of the promotions.

- **Maximum number of discounts:** Indicates the maximum number of orders during the start and end dates of the discount.
- **Maximum amount of discount:** Indicates the maximum amount in the currency term during the discount period.
- **Maximum amount of discount per order:** Indicates the maximum discount amount in the currency term for each order.
- **Maximum quantity of discounted items:** Indicates the maximum quantity during the discount period. For combinations, this is the maximum combination quantity. For other discounts, this is the maximum quantity for all eligible products combined.
- **Maximum quantity of discounted items per order:** Indicates the maximum items allowed for each order. For combinations, this is the maximum combination quantity. For other discounts, this is the maximum quantity for all eligible products combined.

Note: Approve all promotion types for creating promotions.

Create Promotion

To create promotions:

1. On the springboard, click **Promotions**.
2. Click **Create**.
3. Select the type of promotion, for example, Fixed Discount.
4. Enter values for the fields such as promotion name, number, and currency. The fields that appear on the Create page is specific to the type of promotion you choose.
5. Click **Save and Continue**.
   Promotion Summary subtab opens.
6. Enter values for fields such as shipment start date, shipment end date, and discount limit. The fields in the Promotion Summary page is specific to the type of promotion you choose.

7. Submit the promotion.

   Only when you submit, you can use the promotion. When you submit, the **Draft** status changes to **Approved**.

8. Click **Save and Close**.

Add Products to Promotion

You can either add individual products to the promotion or create a promotion group to apply promotion tactics to multiple products at once.

> **Note:** This doesn't apply to dynamic combo promotion.

You must sign in using an account manager role to add products.

1. On the springboard, click **Promotions**.
2. Click a link to edit a promotion.
3. Click **Promotion Products** subtab.
4. Click **Create**.
5. Select a product from **Product Name** list.
6. Specify the Percentage Discount. Alternatively, you can specify the amount.

   Optionally, specify the following fields for the purpose of promotion evaluation:

   a. Baseline: Estimated sales of the product without the promotion tactics.
   b. Incremental (Lift) Percentage: The estimated percentage increase in sales over baseline through promotion tactics.
   c. Margin: The estimated gross profit in percentage.
7. Click **Save**.

Add Promotion to Shopping Cart

You must sign in using account manager, field sales representative, or sales manager role to add promotions to shopping carts. When you add a promotion to a cart, all the products in that promotion are added to the cart.

To add a promotion to your cart:

1. On the springboard, click **Accounts**.
2. Click a link to edit an account.
3. Select the Promotion subtab. Select the promotion and click **Add to Cart** and click **Save**.
4. Select the Profile subtab and select the link to the shopping cart.
5. Select the following to edit the quantities depending on the type of promotion:

   o For fixed and dynamic combo promotion: Select the Promotions subtabs and enter the combo quantities. Additionally, for dynamic combo promotion, you must enter the combo selection quantities using the Products subtab.
   o For fixed discount and volume discount: Select the Products subtab to enter the quantities.
6. Click **Save and Close**.

   Repeat steps three through six to add multiple promotions to a cart.

> **Note:** You must click **Save** after adding the promotions to cart for your promotions to reflect in the cart.

Delete Promotion

You can delete promotions that are in draft status. You can't delete approved promotions.

To delete a promotion:

1. On the springboard, click **Promotion**.
2. Select the link to edit a promotion.
3. Select **Actions** > **Delete**.

    This action deletes the promotion from the database.

Associate Promotion to Accounts

These four types of promotions can be associated with multiple accounts after the promotions have been created using the Accounts subtab from the Promotions object. Click **Add** to select the eligible accounts for the promotion and click **OK**.

Related Topics
- Manage Dynamic Combo Promotion
- Manage Volume Discount Promotion
- Manage Fixed Combo Promotion

Manage Fixed Discount Promotions

As a sales administrator or marketing manager, offer fixed discount promotions for a list of selected products. Create promotion programs as templates to create fixed discount promotions. For more information about managing promotion programs and groups, see Promotions section.

Fixed discount promotions have template promotion programs and promotion groups have products that are on promotion into groups. For more information about promotion programs and promotion groups, see the Manage Promotions section.

1. Creating a fixed discount type promotion.

    If you select the Mandatory check box for a fixed promotion, the promotion is automatically applied for the products included in the promotion.
2. Adding products to the promotion.
3. Assigning the promotion to accounts.
4. Adding the promotion to the shopping cart.
5. Deleting the promotion.

Manage Promotion Programs

As marketing managers or sales managers, you can use a promotion program template for creating promotions. When you use a promotion program to create a promotion, your promotion inherits all the configurations in that program.

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You can optionally specify product category for a promotion program. Specifying a product category for a promotion program allows products in that product category to be added to the promotion program.

These configurations include:

- Duration for which the promotion is valid.

- Products on which the promotion is applicable.

- Variable promotion tactics such as discounts.

- Funding methods for each variable promotion tactic.

  Using a promotion program is optional. You can change the values in your promotion; however, after you have created a promotion you can't apply the program.

  The status of a promotion program can either be draft or approved. An approved promotion program can be used for creating promotions. Draft status means that a promotion program is being developed and isn't available to create promotions yet. When a promotion program is submitted, its status changes from draft to approved.

Create and Edit Promotion Programs

You must sign in as a marketing manager to create promotion programs.

To create promotion programs:

1. Click **Promotion Program** on the springboard.
2. Click **Create**.
3. Specify the name of the promotion program, start date, and end date for the promotion program you're creating.
4. Click **Save**.

   At this point, the promotion program is in Draft status.
5. Click **Submit**.

   The promotion is now in Approved status. Approval here means that the program has been reviewed by the marketing manager and can now be used for creating promotions.

Delete Promotion Programs

You can delete promotion programs that are in draft status. After submission, you can't delete a promotion program.

To delete a promotion program:

1. Edit a promotion program in draft status.
2. Select **Actions** > **Delete**.

Assign Multiple Variable Tactics to Promotion Programs

As a marketing manager, you can use multiple variable tactics in the form of discounts to cover the costs incurred on different discounts and promotions. Add variable tactics to the promotion programs and set the variable tactics to manage the promotion more effective.

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1. Select **Promotion Program** on the springboard and click a promotion program.
2. Select the promotion product or promotion group subtab depending at which level you want to assign the tactic values.
3. Select the Discount Method and related fields become active accordingly. Enter values for the fields.
4. Click **Save and Close**.

Add Fixed and Variable Tactics to Promotions

As a sales manager and account manager, you can design your promotions with multiple fixed and variable tactics.

Fixed Tactics

When you promote a product you incur a cost to advertise your promotion. These include costs incurred on signboards, brochures, fliers, and discount coupons. As an account manager, you can set multiple fixed tactics for each promoted group or promoted product to make account promotions more effective. You can optionally specify these costs in these categories when creating a promotion:

- Advertising: Cost of advertisements on print or electronic media.

- Merchandising: Costs incurred on display techniques and free samples.

- Catalog: Cost incurred on promotional products such as fliers and brochures.

- Space: Cost incurred on preferred location and space.

Add Fixed Tactics to Promotions

To add fixed tactics to promotions:

1. Select promotion icon and select the promotion product or promotion group subtab depending at which level you want to assign the tactic values.
2. Select the tactic type as **Fixed**.
3. Enter the values for fields such as **Tactic** and **Amount**.
4. Click **Save and Close**.

Add Variable Tactics to Promotions

You can make your promotions effective by setting up multiple variable tactics. Variable tactics are available in the form of discounts. It's the price incurred on promotions from providing different discount methods.

To add variable tactics to promotion:

1. Select **Promotions** and click a promotion.
2. Click Promotion Group or Promotion Product subtab depending at which level you want to assign the tactic values.
3. Select the tactic type as **Variable**.
4. Select the Discount Method and accordingly the related fields become active. Enter the values for the fields.
5. Click **Save and Close**.

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Manage Promotion Groups

As a sales manager, you can use a promotion group to apply or modify promotion tactics to multiple products at once.

Create and Edit Promotion Groups

You must sign in using marketing manager role to work with promotion groups.

> **Note:** Promotion groups are based on the search criteria. When your specified criteria returns no results, you must delete the blank group and create another.

To create promotion groups:

1. Click **Promotion Program** and select a promotion program from the list.
2. Click **Create**, and enter values in the fields, as defined in the following table.

Field	Description
Program Group	Indicates the broad category or the logical grouping of the products for applying promotion tactics and evaluation metrics.
Product name	Indicates the search criterion to group products in a promotion group. Alternatively, you can also use Product identifier as the search criterion.
Discount Method	Indicates the selection of your discount method; the **amount** or **percentage**.

Optionally, you can specify the following methods:

   a. Funding Method: Off Invoice or Bill Back.
3. Click **Save** to submit your query to populate products based on the search criterion.

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4. Click the Promotion Products subtab.

   On the Promotion Products subtab, all of the products that meet your criterion are shown along with the discount amount or percentage.

   - Click **Create** to add individual items to the group.
   - Review the items and remove the ones that you don't want.
   - Change the discount of individual products. For example, you may want to decrease the discount on premium jackets to 15% from 25%.

     > **Note:** If you create a group that offers say 25% discount on all products and you modify the discount of an individual product in that group to say 15%, then if you change the discount again at group-level, that individual product continues to show 15%.

Delete Promotion Groups

You can delete a promotion group that you had previously created. When you delete a promotion group, it removes the products in the promotion products subtab which were automatically added based on the product name in the promotion group. The remove action doesn't physically delete the products.

To delete a promotion group:

1. Select the Program Group subtab.
2. Review the program groups and remove the promotion group you want to.

Manage Volume Discount Promotion

As a salesperson, you can offer volume discount promotion based on the quantity.

Volume discount type has two subtypes:

- Stair: The quantity points to a range in the discount range table. The discounted value for stair discount is taken from the range in which the quantity falls in.

- Step: The quantity points to a range in the discount range table. The discounted value for step discount is taken from the range before the range in which the quantity falls. For example, if the quantity is 125 and in the range of 101-150, the discount range applied is the one that falls in the range that precedes 101-150, say 51-99. The quantities that are in excess of 99 but lesser than 101-150, are sold at the list price.

To perform the following tasks to manage fixed promotions, see the Managing Promotions: Overview topic.

1. Creating a volume discount type promotion.
   On the Promotion Summary page, select the volume discount type from the drop-down list.

   - **Stair** and **Step** discount
   - Discount method such as **amount** or **percentage**.

   To create a discount range click the Discount Ranges tab and click **Create**.
2. Adding products to the promotion.
3. Assigning the promotion to account.

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4. Adding the promotion to the shopping cart.
5. Deleting the promotion.

Manage Dynamic Combo Promotion

As a salesperson, you can use dynamic combo promotion to offer multiple product groups and purchase quantity requirement at the group level.

Within each group, you can select the following options to meet the minimum quantity:

- Quantity of individual products

- Total quantity of all products in the group

Dynamic combo promotion has **Dynamic Combo** and **Rebate Discount**. Rebate discount is similar to Dynamic Combo. Calculate the rebate the consumer goods solution. Use the rebate discount subtype indication for tracking purposes.

1. Create a dynamic combo type promotion.

   On the Promotion Summary page, while entering values for fields, you can select the dynamic combination type as Dynamic Combination or Rebate Discount. Select Combination Groups and click **Create** to manage combination groups.

   Enter details for fields such as combination group quantity and currency. Click **Save and Close**.
2. Add products to the promotion.
3. Assign the promotion to accounts.
4. Add the promotion to the shopping cart.
5. Delete the promotion.

Manage Fixed Combo Promotion

As marketing managers, you can bundle SKUs and sell them with Fixed Combo Discount. Sales representatives can't alter it, they can specify the quantity of fixed combinations that customer is purchasing. For information about fixed promotions, see Manage Promotions.

Perform the following tasks:

1. Create a fixed combo type promotion.

   Use the Combo Groups subtab and click **Create** to manage combo groups.

   Enter fields such as combination group quantity and currency. Click **Save and Close**
2. Add products to the promotion.
3. Assign the promotion to accounts.
4. Add the promotion to the shopping cart.
5. Delete the promotion.

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Allocate Funds to Promotions

As account managers, you can allocate funds to the promotions and deduct the amount from the fund associated with your account. You can associate multiple promotions with a fund.

To create a fund, see the Manage Budgets and Funds section in Using Consumer Goods Guide.

To allocate funds to a promotion:

1. Navigate to Promotions and select the promotion to which you want to allocate funds to.
2. Navigate to the Accounts subtab and perform the following steps:

    a. Click **Add** to search for the account that's associated with the fund which you use to allocate an amount for the promotion.
    b. Search and select the account you want to associate with the promotion and click **OK**.
3. Navigate to the Fund Allocation subtab and click **Create**.
4. On the Create Fund Allocation page, you must specify the following information and click **Save and Close**:

    ○ Select the trade fund from which you want to allocate funds to the promotion.

    > **Note:** You must select an active fund.

    ○ Specify the amount to allocate for the promotion.
5. Click **Submit** > **Save**.

    > **Note:** After a promotion is submitted, the promotion status is automatically changed to approved. The fund allocation is automatically approved. After the associated promotion is submitted.

6. On the fund allocation subtab, click the name of the fund which was used to allocate funds to the promotion.

    The fund record opens. The account manager can review the remaining balance and allocated amount which have been updated after deducting the amount that's approved for the promotion.

Related Topics
- Use Budgets and Funds Example

Evaluate Trade Promotions

As an account manager, you can evaluate the efficacy of a promotional activity with the help of evaluation metrics. Based on these metrics, you can modify the promotional activity to meet your organizational targets.

To evaluate the performance of a promotion, select promotion and click the Summary subtab to view the figures for evaluation.

Calculate the metrics from the following examples:

> **Note:** To calculate these metrics, enter the baseline sales, projected lift percentage, and gross margin for individual promoted product.

Gross Sales

Gross Sales is the projected total sales amount with the promotion in effect.

Sum of (Effective Price for each item * Baseline * (1 + Incremental Lift %)) gives you the figure for gross sales.

Effective Price for each Promotion Item: List Price * (1 - Discount in Percentage) or List Price - Discount in Amount.

> **Note:** If there are multiple line items for the same promotion item, the calculation is additive on the original list price.

Incremental Sales

The projected additional sales amount with the promotion in effect compared to the projected baseline sales amount without the promotion in effect.

Gross Sales - Sum of (List Price for each item * Baseline for each item) gives incremental sales.

Incremental Profit

The projected additional profits with the promotion in effect compared to the projected profits without the promotion in effect.

Sum of (Effective Gross Profit * Baseline * (1 + Incremental Lift %)) - Sum of (Original Gross Profit * Baseline) gives the incremental profit.

Effective Gross Profit: Effective Price- Cost of Goods Sold. Cost of Goods Sold for each Promotion Item: List Price * (1- margin percentage).

Original Gross Profit: List Price- Cost of Goods Sold.

Trade Spend

The projected trade spending amount from all tactics from the promotion in effect.

Sum of All Fixed Promotion Metrics line items + Sum of (Discount for each item * Baseline * (1 + Incremental Lift %)) gives the trade spend.

Sum of All Fixed Promotion Metrics line items: Sum of tactic amount attribute value of all promotion product lines with fixed tactics such as advertising, merchandising, catalog and space.

Discount for each item: Discount amount per UOM for each promotion product line with variable tactics such as discount. If the discount method for the promotion product line is amount, the discount for each item is the value of the discount amount attribute. If the discount method for the promotion product line is percentage, the discount for each item is the value of the discount attribute.

Return on Investment

You can see the investment returns in percentage from the trade spend.

Incremental Profits and Trade Spend gives the return on investment.

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Manage Dynamic Combo Promotion

As a salesperson, you can use dynamic combo promotion to offer multiple product groups and purchase quantity requirement at the group level.

Within each group, you can select the following options to meet the minimum quantity:

- Quantity of individual products
- Total quantity of all products in the group

Dynamic combo promotion has **Dynamic Combo** and **Rebate Discount**. Rebate discount is similar to Dynamic Combo. Calculate the rebate the consumer goods solution. Use the rebate discount subtype indication for tracking purposes.

1. Create a dynamic combo type promotion.

   On the Promotion Summary page, while entering values for fields, you can select the dynamic combination type as Dynamic Combination or Rebate Discount. Select Combination Groups and click **Create** to manage combination groups.

   Enter details for fields such as combination group quantity and currency. Click **Save and Close**.
2. Add products to the promotion.
3. Assign the promotion to accounts.
4. Add the promotion to the shopping cart.
5. Delete the promotion.

Publish Promotion Programs to Clusters

You can create, associate, and publish Promotion Programs to clusters.

Perform the following steps to use the promotion programs with clusters:

- Add multiple products in a product group to a promotion program.
- Specify promotion discounts, SKU, and funding methods.
- Associate the promotion program with clusters.

Here is how you can publish promotion programs to clusters:

Create Promotion Programs

As a marketing manager, you create promotion programs in the following manner:

1. On the springboard, click **Promotion Programs > Create**.

   Create promotion program page appears.
2. Specify values for the fields such as promotion program name.
3. Click **Save and Continue** to create a promotion program in the **Draft** state.

   Promotion Program Summary subtab opens.

4. Go to the Promotion Group subtab and click Create to add products in that group to the promotion program.
5. Save the promotion group and go to promotion products to see associated products.
6. Submit the promotion program or use your custom approval flow.

   Only when you submit, the **Draft status** changes to **Approved**.
7. Click **Save and Close**.
8. Your promotion program is now approved.

   You can now proceed to associate the promotion program to the clusters.

Associate Promotion Program with Clusters

You can associate promotion program with an existing cluster to apply promotion program to all accounts in a cluster.

You must sign in using a marketing manager role to add products.

1. On the springboard, click **Promotion Programs**.
2. Click a link to edit a promotion program.
3. Click **Clusters** subtab.
4. Select a cluster from **Clusters** list and click **Save**.
5. Cluster is now associated with the promotion program.

   You can now publish the promotion program.

Publish Promotion Program

You must sign in as sales administrator or marketing manager role to publish promotion programs to clusters. When you add a promotion program to a cluster, all the products in that promotion program are added to all accounts linked to the cluster.

To add a promotion program to a cluster:

1. On the springboard, click **Promotion Program**.
2. Click a link to edit an account.
3. Select **Actions >** > **Publish**.

   Your promotion program is now published.

Delete Promotion Program

You can delete promotion program that's in the draft status. You can't delete a promotion program in approved status.

To delete a promotion program:

1. On the springboard, click **Promotion Program**.
2. Edit a promotion program.
3. Select **Actions** > **Delete**.

   The promotion program is now deleted.

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Additional Information

Keep the following additional information while working on the promotion programs.

- Publish process is asynchronous and the promotion programs are available for use only after successful publish.

- Each promotion record includes one targeted account and its descendant accounts.

- The default naming convention is `<promotion program name>-<targeted account name>`.

- The territory section is deprecated.

- Only fixed discount type is supported for promotion program.

- You can navigate to the promotions subtab to see the newly created promotions.

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14 Reports and Analytics

Use Sales Infolets

As administrator and salesperson, stay up to date with performance using reporting and analytics capabilities through a dashboard. You can use infolets on Sales Infolets page to view important metrics related to appointments, accounts, promotions, tasks, and sales performance.

You can click an infolet for details of the related account-specific transactional data.

Sales vs Target

This infolet shows a summary of the sales from all the orders vs the sales target and the resulting gap depending on the sales made. The detailed report for the sales manager shows the sales vs target and the target gap for the current quarter. You can see the report for the sales manager and salesperson.

> **Note:** The Sales vs Target infolet doesn't have a detailed report.

Visits vs Target

This infolet shows scheduled store visits vs completed store visits in the current quarter. The detailed report shows visits vs targets vs gap on a monthly basis. A bar takes you to a list view of all the records for the bar.

In-flight Promotions

The promotions that have resulted in orders are In-flight promotions. This infolet shows the count of promotions and total order amount in the current quarter. The detailed report shows a monthly breakdown of the total order amount generated. A detailed report gives a list of the order items from in-flight promotions for the month.

Sales Trend

This infolet shows all the orders and the amount generated from all the orders for the current quarter. The detailed report shows the monthly sales amount chart compared to the same period the previous year. A detailed report gives a list of the orders in the month.

Accounts

This infolet shows the count of managed accounts and count of accounts meeting the per-account sales targets for the current month. Define Meeting targets as the total order amount for the month which is greater than or equal to the per-account sales target for the month. If there is no per-account sales target for the month, it's considered as meeting the target.

The detail report has a list of managed accounts with total order amount and per-account sales target for each account in the current month. A detailed report lists all orders for the selected account.

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Eligible Promotions

This infolet shows a count of eligible promotions in the current quarter. Eligible Promotion is a promotion that's active for at least one day in the quarter. Eligible promotions also include all in-flight promotions. Eligible promotions are available for order capture.

The Detail report lists down the accounts with count of eligible promotions for each account. A detail report lists all the eligible promotions for the selected account.

For more information about working with analytics and reports, see Using Analytics and Reports guide.

Other Infolets

In addition to the infolets on the dashboard, the following infolets are available on the Overview subtab of Account:

- Promotions: Shows the count of promotions that are active in the current week.
- Orders: Shows the count of orders placed in the current week.

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15 Synchronization Administration

Manage Synchronization Administration

The retail execution mobile application provides a subset of Oracle Customer Experience capabilities optimized for the disconnected mobile user experience.

The specific needs of each organization will vary and all organizations must balance their data needs and mobile device memory resource constraints. You, as an administrator need the ability to manage objects included in synchronization routines for the mobile application and also for filtering rules for the data of those objects. Data visibility on the device is the combination of the resulting synchronization rules and user security access rules. Retail Template App mode is enabled if the **Use Sync Rules for Retail Template App** profile option is set to **Y**.

Pregenerate Default Synchronization Rules

Pregenerate the sync rules which are applied by default while you download records to mobile. Only specific sync rules are enabled by default, which is governed by data objects required by the retail template application.

The administrators can enable other default sync rules or add custom sync rules if they plan to support more data objects in a newer version of the retail template application. The administrators also have the provision to disable any sync rules if they don't want to download specific data objects in their download package. Here are the steps to generate default sync rules in Oracle Fusion application environment:

1. Check whether the **ORA_ACO_USE_SYNC_RULES_FOR_RETPL** profile option is set to **Y**. If not, then set the value to **Y**.
2. Run the Enable Consumer Goods Object Extension for the Mobile Application ESS job.

This will generate default sync rules in the environment. Here's how you can verify and configure sync rules.

View or Edit Synchronization Rules

Here's how you can view retail template application sync rules:

1. After the ESS job is completed, navigate to Sync Rules on the Home page.
2. Click **Sync Rules** icon to view all the default sync rules.

Newer sync rules inserted are listed. You can distinguish sync rules for the retail template application by looking at the Rule for Retail Template App column on the Sync Rules page.

View Retail Template Application Sync Rule

Click the specific retail template application sync rule to navigate to the Sync Rule: Account: Summary section. Sync rule has details such as object name, reference field from the object, parent object name, reference field from parent, parent sync rule, criteria group operation, whether the rule is active, and the option to specify whether the object must be synced (active rule).

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Configure Additional Fields in the Appointment Download Package in Specific Objects

1. Navigate to the Sync Rule: activities: Object Attributes page for the object-specific sync rule (for example, route).
2. If you need to download additional fields to mobile, you can configure in the **Object Attributes** subtab under Sync Rules. Click **Add**.
3. Search for the field to add to the download package and click **OK**.
   Those fields will get added to the Object Attributes section.

Add or Update Filter Criteria

Here's how you can add or edit filter criteria on Filter Criteria Group: Default Criteria Group: Summary page:

1. Filter criteria group groups multiple filter criteria and you can specify the criterion combination operation.
2. Criteria group has a child object filter criteria. Use it to add additional criterion.
3. Default filter criterion is pregenerated. You can update as required.

Here's the list of field types and their corresponding operations that are supported:

Table

Field Type	Operation	Values Accepted in Filter	Description
Text	=	<<alpha numeric>>	Not available
	in	null	
	!=		
	is		
Number	Between	<<number>>	Not available
	=	null	
	>		
	>=		
	in		
	<		
	<=		
	!=		
	Is		

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Field Type	Operation	Values Accepted in Filter	Description
Date	After	Today	D - day
	Before	Today-1D	M - month
	Between	Today+1D	Y - year
	=	Today-1M	
	>	Today+1M	
	>=	Today-1Y	
	<	Today+1Y	
	<=	<<date in string format>>	
	!=	null	
	Is		
Checkbox	=	Y	Not available
		N	
Percentage	Between	<<number>>	Not available
	=	null	
	>		
	>=		
	<		
	<=		
	!=		
	Is		
Date Time	After	Today	D - day
	Before	Today-1D	M - month
	Between	Today+1D	Y - year

Field Type	Operation	Values Accepted in Filter	Description
	=	Today-1M	
	>	Today+1M	
	>=	Today-1Y	
	<	Today+1Y	
	<=	<<date in string format>>	
	!=	null	
	Is		
Currency	Between	<<number>>	Not available
	=	null	
	>		
	>=		
	<		
	<=		
	!=		
	Is		
Picklist	=	Lookup Code (Picklist Code)	Not available
	In		
	!=		
	Is		

Apply Sync Rule Filtering in Records Downloaded to Mobile

After the sync rules are configured, run the **Prepare Consumer Goods Appointment Download Document** ESS job to regenerate the download package then sync the mobile application to get the filtered (sync rule applied) records.

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Create Sync Rule for Custom Objects

1. Run **Enable Consumer Goods Object Extension for the Mobile Application** to ensure that the new object is added to object configuration and its fields are added to object attributes in Oracle Customer Experience.
2. Add Custom Object to Mobile as a feature using Mobile Application Composer and configure fields that must be packaged in layouts.
3. Click **Sync Rules** icon on the Home page to get the list of existing sync rules.
4. Click **Create** button to create a new sync rule.
5. Provide details on the Create page, select the object from the object dynamic choice list. If you want to sync the object then select the sync option. Select the criteria group combination operation and save the record.
6. If the profile option for **Use Sync Rules for Retail Template App** is **Y** then run the Enable Consumer Goods Object Extension for the Mobile Application ESS job for registering the new object in the object criteria. Navigate to the corresponding object in the Sync Rule and add fields.
7. Create filter criteria groups to add filter criterion by clicking **Create** button in the Filter Criterion Group subtab.
8. Add the filter criterion by selecting the field, operation, and value.

Add Custom Fields in Filter Criteria

1. You can create filter criteria on custom fields.
2. Run **Enable Consumer Goods Object Extension for the Mobile Application** to ensure that the newly added fields are added to object attributes in Oracle Customer Experience.
3. Navigate to filter criterion of the Sync Rule to add the custom field.
4. Click **Create** and select the field from the dynamic choice list, the field type is autopopulated. Select the operation that must be performed while filtering and select the target value.

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