Oracle Sales Cloud
Using Sales for Consumer Goods

Release 13 (update 18B)
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Preface
This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help
Use help icons 📘 to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- **Community:** Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
- **Guides and Videos:** Go to the Oracle Help Center to find guides and videos.
- **Training:** Take courses on Oracle Cloud from Oracle University.

Conventions
The following table explains the text conventions used in this guide.

<table>
<thead>
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<th>Convention</th>
<th>Meaning</th>
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<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
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<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
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Documentation Accessibility
For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.
Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 About This Guide

Audience and Scope

This guide provides information on how sales representatives and their managers can use the Consumer Goods industry solution.

This guide describes the business flows and functionality in retail execution and trade promotion areas and how you can perform your day-to-day operations in these areas.

Related Guides

You can refer to the following related guides to understand more about the business flows and functionality covered in this guide.

<table>
<thead>
<tr>
<th>Guide</th>
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<tr>
<td>Oracle Sales Cloud - Using Retail Execution Mobile</td>
<td>Describes how to perform tasks related to retail execution and trade promotions management using consumer goods mobile and tablet applications.</td>
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<tr>
<td>Integrating Retail Execution Mobile Direct-Store-Delivery</td>
<td>Provides information on how you can integrate back end systems such as supply chain, accounting, or order management systems with the Direct-Store-Delivery processes in Oracle Customer Experience (CX) Retail Execution Mobile.</td>
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<tr>
<td>Oracle Sales Cloud - Getting Started with Consumer Goods Implementation</td>
<td>Describes how to set up and configure Oracle Sales Cloud for Consumer Goods either while implementing or after implementing Oracle Sales Cloud.</td>
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<td>Oracle Sales Cloud - Using Sales</td>
<td>Contains information on how you can perform your day to day sales activities using Oracle Sales Cloud.</td>
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<tr>
<td>Oracle Applications Cloud - Using Common Features</td>
<td>Contains information on how you can perform your day-to-day activities using Oracle Applications Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud - Using Analytics and Reports</td>
<td>Contains information about reporting and analytic capabilities of Oracle Sales Cloud.</td>
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Tip: Ensure that you perform all the steps detailed in this guide to complete the setup and configuration of the Consumer Goods application. This will enable you to use the application for your day to day retail execution activities and manage trade promotions.

Related Topics

- Oracle Help Center
• Integrating Retail Execution Mobile Direct-Store-Delivery
2 Consumer Goods Overview

Consumer Goods: Overview

This topic provides an overview of retail execution and trade promotion in the Consumer Goods industry.

Use the retail execution activities in Consumer Goods to plan and perform your retail visits for the day. Check in to retail stores to view the history of orders, perform audits, replenish stock, evaluate stock location, analyze the efficiency of store visits, and so on. Use direct store delivery to deliver orders, collect payments, and so on. Use the trade promotions activities in Consumer Goods to manage offers and discounts in retail stores, use promotion program templates to design promotions, create and manage trade funds to finance promotions, measure the effectiveness of promotions, and so on.

Retail Execution

Retail execution tasks can be categorized into the following:

- **Merchandising**: Merchandising is the business process for the field sales representatives to visit stores for inventory auditing, promotion presentation, account and promotion survey execution, and order capture.

  The following tasks can be performed for Merchandising:

  - Preparing for retail visits: Plan and schedule activities that you want to perform during retail visits. While preparing for a retail visit, you review and schedule appointments, review promotions, review open tasks and verify customer information including location.
  
  - Performing retail activities during visits: Perform retail activities like checking in to appointments and performing inventory audit, reviewing promotions with the store manager and adding them to the shopping cart, creating and reviewing orders, and conducting surveys and assessments.
  
  - Closing retail visits: Complete your visit to a retail store and performing activities like making a note of pending activities, rescheduling pending activities, creating appointments for follow-up visits, and checking out.

- **Direct Store Delivery**: This is the business process involving delivery of shipments and collection of payments for orders. The retail execution feature can be executed in its entirety using the Oracle CX Retail Execution Mobile Application. For more information on executing these features, refer to the Using Retail Execution Mobile guide.

  You can use the Direct Store Delivery features to:

  - Manage the distribution center and route assignments.
  
  - View your route inventory and inventory reload reports.
  
  - Manage delivery, cancel, and return orders.
  
  - Collect order delivery and credit payments.
  
  - Settle routes.

Trade Promotion

Oracle Sales Cloud for Consumer Goods enables marketing managers and account managers to manage different types of promotions using trade promotion management.
The different types of promotions offered are:

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

Let’s understand trade promotions using a scenario. This scenario is an example of a process performed by brand managers and account managers. Your company may follow a different process according to its business requirements.

A beverage manufacturer has developed a new brand of fruit-flavored beverage. The marketing manager creates a promotion program to launch and promote the new brand. Account managers for a large chain of grocery stores are responsible for creating promotions to generate incremental volume and brand awareness. They follow this up with a review of the promotion program. The account manager then modifies the promoted products to include in the promotion and publishes it. The promotion is now available to the field sales representative as part of the retail outlet visit.

Trade promotions can be executed in its entirety using the Oracle CX Retail Execution Mobile Application. For more information on executing this feature, see the Using Retail Execution Mobile guide.
3 Working with Accounts

Managing Accounts

Accounts are the retail stores that you visit.

Each account has an associated shopping cart that you use for adding products for that account. For each account, a field sales representative is assigned as the owner. You can either create accounts or import them. While working with an account, you can view the details of the visits for an account. You can also view account details using the Accounts infolet to quickly reference analytics. Take stock of your shelf stock and place orders for inventory. Lastly, monthly sales targets can be set up by the account manager and sales manager for each account their team manages.

Note: You can also create notes for accounts by selecting the Notes subtab for the Accounts object.

Creating and Editing Accounts

You must sign in using the sales manager or a sales administrator role to create or edit accounts.

To create accounts:

1. On the springboard, click Accounts.
2. Click Create and enter the details.
3. Click Save and Continue.
4. Specify a field sales representative as the owner of the account.
5. 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.

Managing 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 as well as loaned items.

To create a new merchandising display for an account:

1. Sign in to Oracle Sales Cloud 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 new merchandising display record with the required fields such as name, description, start date, end date, and so on.
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**.
4 Working with Products

Managing Product Assortments

With the consumer goods web application, you can work with product assortment and planogram. Product assortment is the different types 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 specific retail products should be placed on retail shelves or displays to increase customer purchases.

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

4. On the Assortment Summary page, click Attachments and attach any planogram related attachment. Click OK.
5. Click the Product Assortment Line subtab, select create and enter the necessary values like legal entity, business unit, UOM, and so on.
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 Sales Cloud Getting Started with Consumer Goods Implementation guide.

Managing Priority Products

Consumer Goods enterprises can set product selling priorities on changing company strategies and market conditions. Such priorities must be made available to the sales team and the results must be measured for each account for continuous selling guidance.
This topic covers two central concepts for managing priority products:

- Priority Portfolio
- Priority Portfolio Attainment

Creating and Associating Priority Portfolio

The priority portfolio is a group of product categories to be promoted over non-priority products. The product categories include individual stock keeping units (SKUs) and can be updated to suit your business requirement.

As the account manager, you can create priority portfolio. To create priority portfolio, you must first add products to the product groups by performing the following steps:

1. Sign in as the account manager.
2. Select Product Groups from the springboard and click Create.
3. Enter the name and description for the product group and click Save and Continue.
4. Navigate to Priority Products subtab and click Add.
5. 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 groups have been added to the priority portfolio.

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.

Viewing Priority Portfolio Attainment

Sales results are measured against the set priorities for each account.

To view the priority portfolio attainment:

1. Sign in as the sales representative.
2. Select Accounts from the springboard and select an account.
   
   You can view the product group infolet on the Account Overview page.
3. Select the Analytics subtab and view the details of the priority portfolio attainment including:
   - Attainment for each product group and,
   - Number of orders and sales amount of orders for each priority group.
Managing Price Books and Taxation

Price book contains the pricing information for various products that are sold by an organization. Price books can also be used by manufacturers to establish account-specific pricing.

After you create price books, they are available for use in Oracle Sales Cloud for Consumer Goods. Price books are created to establish organization-specific product pricing. A price book includes the list of approved products to be sold, and optionally, two product-specific taxation values that allows the tax values to be quoted on a product basis. 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. Only the sales administrator role has the privilege to create price book. Association of a price book with an account and route can be done by all the users except the marketing manager user.

Creating 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 on creating sales catalog and adding products to it, see the Creating Your Sales Catalog chapter in the Oracle Sales Cloud Implementing Sales Guide.

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

**Note:** Ensure that while adding products to a price book, the UOM is the same as that selected while creating Item in Oracle Product Value Chain Cloud Product Information Management.

Associating Price Books with Accounts and Routes

You can associate price books to account and route.

Associate price book to account:

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

Associate price book to route:

Navigate 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.

Managing Taxation

As the sales administrator, for each product you can enter the taxation rates in the price book. 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. Sign in as Sales Administrator.
2. Click **Price Books** on the springboard and select a price book record.
3. Select the **Tax Code** and **Tax Method** applied to all products in the price book.
4. Enter tax percentage or amount values for each product listed in the price book for the account.
5. Click **Save and Close**.

The tax amount is calculated for invoices generated by the Oracle CX Retail Execution Mobile application.

**Related Topics**

- [Oracle Sales Cloud Implementing Sales Guide](#)
5 Working with Distribution Centers and Routes

Managing Distribution Centers and Routes

As the sales administrator, you can manage the distribution centers to assign and reassign routes and sales representatives 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 sales representative assigned to a route must belong to the distribution center of that route.

Creating Distribution Center and Assigning Resource

As the sales administrator you can manage the distribution centers so that you can assign and re-assign routes and sales representatives to them depending on your requirement.

To create a distribution center record:

1. Sign in as the sales administrator.
2. Click Distribution Centers on the Springboard and select Create.
3. Enter the values for fields such as distribution center contact details, address, and so on.
4. 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.

To assign an existing route to the distribution center you created:

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

Creating Route and Assigning Resource

A route is created and assigned resources and associated with a distribution center. Assortment can be associated with a route for the Oracle CX Retail Execution Mobile application to identify sellable and unsellable products in its route inventory.

You can optionally specify a product category for a route. The sales representative for the route will view and sell products of the specified product category only in the Oracle CX for Retail Execution application.

To create and allocate routes:

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

A new record is created.

To assign a resource to the route you created:

1. On the springboard, click **Route Allocation**.
2. Select a route from the Routes Landing page. On the Route Summary page, select from existing routes. Assign the resource to the route by selecting the resource from the drop-down list.

> **Note:** The selected route and resource must belong to the same distribution center created. You must select the resource as **Primary** by using the check box to ensure that route related data is synced between the web and mobile application. However, each route can have only one resource assigned as Primary. This resource selected as primary must be the one signing in to the Oracle CX Retail Execution Mobile application.

3. Click **Save and Close**.

The resource has been assigned to the route.

**Viewing Route Check In and Check Out History**

Sales representatives 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 Oracle CX Retail Execution 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.

**Viewing Assignment History**

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

On route check out, route assignment history is recorded in the Oracle CX Retail Execution Mobile application. To view the route assignment history, go the route object and select the assignment History subtab.
6 Working with Activities

Managing Activities: Overview

As a sales representative, you typically check 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 check 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 is 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 File-Based Data Import and Export guide.

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

Related Topics
- Oracle Sales Cloud Using Sales Guide.
- Understanding File-Based Data Import and Export Guide.

Managing Appointments

This topic covers information on how you manage appointments, tasks, notes, and how you check-in and check-out from a retail visit.

Checking In and Checking Out of a Retail Visit

There are various tasks that you can perform when you are visiting a retail store. You start the retail visit by checking in to the store. You must sign in using a field sales representative or a sales manager role to check in into an appointment.

To check in or check out:

1. On the springboard, click 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.
Scheduling Appointments
You must sign in using the field sales representative 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 are 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 so that the 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.

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

The sales representative takes notes related to a particular store visit. For example, if the sales representative was not able to present the promotions to the store manager because he was not available, the sales representative would then 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**.
Working with Shopping Cart and Shopping Cart Template

Working with Shopping Cart

Using your consumer goods web application, you can work with shopping cart and the shopping cart templates. The shopping cart facilitates the purchase of products by allowing you to accumulate a list of items for eventual purchase. The shopping cart can be used to track products and the promotions applied to them, if applicable. There are three ways to add products to a shopping cart:

- 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.

Adding Products to the Shopping Cart

Each account can have only one 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 are done.
5. Click Save and Close.

   You must click Save after adding the products to see the shopping cart populated with the products.

Adding 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 by providing a customer targeted shopping cart that you can leverage. 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**.

**Adding 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.
8 Working with Surveys

Managing Surveys:Overview

There are two kinds of surveys that you can use.

- Account Survey
- Promotion Compliance Audit Survey

Account Survey

Account surveys allow you 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’s performance at a retail store, its placement, demand, and so on. Use the Assessments subtab to view the survey responses.

Promotion Compliance Audit Survey

Promotion compliance audit surveys are performed at the retail store to ensure effective promotion execution and compliance. Promotion compliance audit surveys ensure promotion activities are being correctly executed across purchased featured space and all applicable stores as per agreed terms and conditions.

Promotion compliance audits help to establish that the terms of your promotional activity are being acknowledged by the retailer and allocated to the agreed purchased featured space. This research data can then be used 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.

Related Topics

- Duplicating Layouts for Surveys

Creating and Associating Survey Templates

You create survey templates in the Consumer Goods Web Application using the same survey template name you created in the Oracle Policy Automation hub.

To create survey template record:

1. Sign in as the sales representative.
2. Select Survey Template on the springboard.
3. Click Create on the Survey Template page and create a record of the template using the same name as used in the Oracle Policy Automation hub.
Associating Surveys to Accounts

Once the surveys or a record has been created, you associate them to the respective accounts depending on your business requirement.

1. Sign in as the sales representative.
2. Click **Account** on the springboard.
3. Select an account and click the Surveys subtab.
4. Click **Create** and edit the survey details like start date, end date, repeat interval, and so on.

   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 is not applicable and the survey will be executed only once. For example, if the repeat value is weekly and repeat interval value is entered as two by the user then this survey will be run once every two weeks.

   **Note:** You can use the repeat and repeat interval options as per your business requirements.

5. Click **Save**.

Associating Surveys to Promotions

To associate surveys to promotions:

1. Sign in as the sales representative.
2. Click **Promotion** on the springboard.
3. Select a promotion and click the Surveys subtab.
4. Click **Create** and edit the survey details like start date, end date, repeat interval, and so on.
5. Click **Save**.

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

**Related Topics**

- Oracle Policy Automation
Managing Returnable Containers

Products are often packaged and delivered to customers using reusable containers which are not sellable. The reusable containers are loaned to the customer and once the sellable product is sold or consumed, the reusable containers must be returned.

Associating 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.

Returning the Empty Containers

Once a product is sold, the returnable container must be returned as it is reused by the manufacturer. 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 number of containers they can retain, the store is levied a charge for each extra container being kept by the store.

Using Returnable Containers: Example

John Allen is an account manager at Vision Corporation. John wants to associate a new returnable container with two new products that the returnable container can contain. After the returnable container has been associated with the two new products, John must associate the returnable container with an existing account named Seven Corporation.

John must complete the following 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.
Creating the Returnable Container Record

A product record must be created for a returnable container though a returnable container cannot be sold.

1. Sign in to Oracle Sales Cloud as the account manager.
2. Navigate to Products and click Create Product.
3. On the Create Product page, define the new container and deselect the Eligible to Sell check box.
4. Click Save and Close.

   The new returnable container record has been created.

   ✏️ Note: The new returnable container must be added to the price book and the product group by the sales administrator.

Associating the Assortment with Seven Corporation's Account Record

An assortment must be associated with the account to associate all the products which the account is selling.

1. Navigate to Account and select Seven Corporation's record from the list of accounts and select it.
2. Navigate 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 new 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. Navigate 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.

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

Assortment line relationships must be created to associate the products which the new returnable container can be sold in and the new returnable container individually.

1. Navigate 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 new 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.

Creating the Container Class Record

The container class record must be created to associate the new returnable container with all the products which the container can be used to be sold in.

1. Navigate to Container Classes and click Create.
2. On the Create page, name the container class record and click Save and Continue.
3. Navigate 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.
6. Click Save and Close.

Adding the Container Class to Seven Corporation's Account Record

The container class record lists all the products which can be contained by the new returnable container.

1. Navigate to Account and select Seven Corporation's record from the list of accounts.
2. Navigate 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.
Managing Budgets

The marketing managers create budgets to allocate funds to partners to drive brand performance. A single budget is be allocated to multiple partners to fund each partner’s individual brand performance activities.

Type of Budgets

Marketing managers create the following types of budgets:

<table>
<thead>
<tr>
<th>Budget Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Budgets</td>
<td>The budget amount is allocated at the time of creating the budget.</td>
</tr>
<tr>
<td>Accrual Budgets</td>
<td>The budget amount varies according to the accrual rules set for budgets.</td>
</tr>
</tbody>
</table>

Rules for Accrual Budgets

Rules are set to calculate the allocation amount for accrual budget. The accrual rules do not apply to fixed budget.

The accrual rules calculate the budget amount based on the performance of the products or assortments the budget is associated to. Accrual rules can be set for:

- Product groups
- Assortment plans
- Individual products

The method used to allocate amount to associated funds depends on the budget basis. The following are the two type of budget basis:

<table>
<thead>
<tr>
<th>Basis Type</th>
<th>Amount Allocation Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cases</td>
<td>The allocation amount is provided in amount.</td>
</tr>
<tr>
<td>Revenue</td>
<td>The allocation amount is provided in percentage.</td>
</tr>
</tbody>
</table>

Allocating Budget

A budget is be distributed among several partners. The marketing manager can choose not to allocate the budget equally among all the eligible partners. The marketing manager can decide on the amount or the percentage of the budget to allocate to each partner.
After the budget is allocated among the partners, child records called funds are be generated to track each allocation individually. Each fund record is used to track the budget amount provided to each partner in the parent budget.

**Calculating Budgets**

The following fields are used to track the amount allocated for a budget:

<table>
<thead>
<tr>
<th>Field</th>
<th>Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balance</td>
<td>Total amount - Total allocated funds in active status</td>
</tr>
<tr>
<td>Projected</td>
<td>Total associated funds in active and in draft status.</td>
</tr>
<tr>
<td>Allocated</td>
<td>Sum of amount allocated to all the child funds.</td>
</tr>
<tr>
<td>Unallocated</td>
<td>Total amount - Allocated amount</td>
</tr>
<tr>
<td>Spent</td>
<td>Total amount paid to partners for allocated child funds</td>
</tr>
<tr>
<td>Unspent</td>
<td>Total amount - Spent amount</td>
</tr>
</tbody>
</table>

**Managing Funds**

Marketing managers create funds or generate the multiple fund records associated with a parent budget. Like budgets, 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’s value. The funds value is inherited from the value allocated to the fund in the Partners subtab of the parent budget.

Funds not associated with parent budgets are defined independently. Accrual rules must be set of independent accrual funds.

**Accrual Funds**

The value of accrual funds can’t be changed. The value of an accrual fund is calculated using the rules of the parent budget, quantity of the product shipped and the revenue. The value of an accrual fund is also dependent on the start date and the end date of the fund. The duration of an accrual fund can’t start before the parent budget or extend after the partner budget's end date.

**Allocating Funds**

Funds are allocated to one or more promotions. Each allocated promotion must be associated with a fund allocation record. The fund allocation record is used to track each allocation individually.
Using Budgets and Funds: Example

Tracy Jones is a marketing manager at Vision Corporation and wants to create a fixed budget and an accrual budget. Along with creating the budgets, Tracy also wants to generate funds for the fixed budget and create a child fund for the accrual budget. Tracy also wants to create a single fund.

This example illustrates how Tracy 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: Marketing manager must also provide edit access to account managers to the budget or the fund that is associated with the fund allocation for which the account manager is approving the promotion.

Creating a Fixed Budget

Tracy must complete the following steps to create a fixed budget and generate its funds:

1. Sign in to Oracle Sales Cloud using the marketing manager role.
2. Navigate to the Budgets subtab of MDF in Partner Management.
3. Click Create Budget.
4. On the Create Budget page, Tracy must specify the following information:
   - Select the type as fixed budget.
   - Select the budget category.

✏️ Note: The fields used to define the budget are dependent on the budget type. For example, the initial amount can be provided for a fixed budget but not for an accrual budget.

5. Click Save and Continue and navigate to the Account subtab.
6. 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 once you have added all the account and allocated the fund amount or the fund percentage for each account.

✏️ Note: Once you click Generate Funds, child funds are created for each partner. Independent funds can also be created without it being generated from a parent budget.

7. Click Save and Close.
   Tracy has created the fixed budget and generated its child funds.
Creating An Accrual Budget

Tracy must complete the following steps to create an accrual budget and create its child fund:

1. Sign in to Oracle Sales Cloud using the marketing manager role.
2. Navigate to the Budgets subtab of MDF in Partner Management.
3. Click Create Budget.
4. On the Create Budget page, Tracy must 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.

5. Click Save and Continue and navigate to the Accrual Rules subtab.
6. On the Accrual Rule subtab, click Create.
7. On the Create page, specify the following information and click Save and Close.
   - Amount for the accrual rule.
   - Start date and the end date for the accrual rule.

8. On the Accrual Rules subtab, select the accrual rule you just created and you can complete the following steps to add a product or multiple products:
   - 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.
   - 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.
   - 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.

9. Click Save and Close.
10. 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.
11. Click Save and Close.
    Tracy has created the accrual budget and created its child fund.
Create a Fund

Tracy must complete the following steps to create a fund:

1. Sign in to Oracle Sales Cloud using the marketing manager role.
2. Navigate to the Budgets subtab of MDF in Partner Management.
3. Click **Create Budget**.
4. On the Create Budget page, Tracy must specify the following information and click **Save and Continue**:
   - Select the type as fixed fund or accrual fund.
   - Specify a Parent budget for the fund.
   - Specify the Allocation Deadline.
   - Specify the Claim Deadline.
5. On the Summary subtab, complete the following steps:
   - **a.** From the Partner drop-down list, select Search to search the partner you want to associate with the fund.
   - **b.** On the Select: Partner page, search and select the partner you want to associate.
   - **c.** Click **OK**.
6. Click **Save and Close**.

Tracy has created a fund.
11 Working with Trade Promotions

Managing Promotions: Overview

Oracle Sales Cloud for Consumer Goods Trade Promotions enables marketing managers and account managers to manage promotions and advanced pricing.

You can optionally specify product category for a promotion. Specifying a product category for a promotion will allow only products in that product category to be added 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 applicable discount limits for each of the promotions you create. The following discount limits can be used:

- Maximum number of discount: The maximum allowed number of orders to which a given discount can be applied during the start and end dates of the discount.
- Maximum amount of discounts: The maximum allowed discount amount in the currency term during the start and end dates of the discount.
- Maximum amount of discounts per order: The maximum allowed discount amount in the currency term for each order.
- Maximum quantity of discounted items: The maximum allowed quantity during the start and end dates of the discount. 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: The maximum allowed quantity 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: All the promotion types can either be in the draft or approved status. An approved promotion can be used for creating promotions.

Creating a 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, currency, and so on. The fields that appear on the Create page will be 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, discount limit, and so on. The fields in the Promotion Summary page will be specific to the type of promotion you choose.

7. Submit the promotion.

Unless you submit, you cannot use the promotion. When you submit, the Draft status changes to Approved.

8. Click Save and Close.

Adding Products to a 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 does not 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.

Adding 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 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 by selecting 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.

Deleting a Promotion
You can delete promotions that are in draft status. You cannot 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.

Associating a Promotion to Accounts
These four types of promotions can be associated to multiple accounts after the promotions have been created by clicking the Accounts subtab from the Promotions object on the springboard. Click Add to select the eligible accounts for the promotion and click OK.

Managing Fixed Discount Promotions
Fixed discount promotions are discounts available on selected products. You can also create promotion programs as templates to create fixed discount promotions. For more information on managing promotion programs and groups, see to the Using Sales for Consumer Goods guide.

To perform the following tasks to manage fixed promotions, see to the Managing Promotions: Overview topic in the Oracle Sales Cloud Using Sales for Consumer Goods guide.

Fixed discount promotions have promotion programs that are templates and promotion groups which club promotion products into groups of products. For more information on promotion programs and promotion groups, see the Managing Promotions chapter.

1. Creating a fixed discount type promotion.
   If you select the Mandatory check box for a fixed promotion, the promotion will be 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.

Managing Promotion Programs
A promotion program is a template for creating promotions. When you use a promotion program to create a promotion, it inherits all of the configurations in that program.
You can optionally specify product category for a promotion program. Specifying a product category for a promotion program will allow only 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 and you can change the values as you like in your promotion even if you are using a promotion program; 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 is not available to create promotions yet. When a promotion program is submitted, its status changes from draft to approved.

Creating and Editing 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 are 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.

Adding Sales Territories to Promotion Program

You can add multiple territories to a promotion program to specify the territories where the promotion program is applicable.

To add territories when creating or editing a promotion program:

1. Select the Sales Territories subtab.
2. Click Add.
3. Search and select one or more sales territories.
4. Click Done.

Deleting Promotion Programs

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

To delete a promotion program:

1. Edit a promotion program in draft status.
2. Select Actions > Delete.
Assigning Multiple Variable Tactics to Promotion Programs

Variable tactics are available in the form of discounts. It is the price incurred on promotions by way of providing different discount methods. Only variable tactics can be added to promotion programs. You can set multiple variable tactics to your promotion program to make the promotion more effective.

To assign variable tactic values to a promotion program:

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

Adding Multiple Fixed and Variable Tactics to Promotions

Promotions can have multiple fixed and variable tactics assigned.

Fixed Tactics

When you promote a product you incur a cost to advertise your promotion. These include costs incurred on signboards, brochures, fliers, discount coupons, preferred display shelf, and so on. 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, free samples, and so on.
- Catalog: Cost of fliers, brochures, and so on.
- Space: Cost for preferred location, space, and so on.

Adding Fixed Tactics to Promotions

To add fixed tactics to promotions:

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

Adding Variable Tactics to Promotions

Variable tactics are available in the form of discounts. It is the price incurred on promotions by way of providing different discount methods. You can set multiple variable tactics to your promotion to make it more effective.
To add variable tactics to promotion:

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

Managing Promotion Groups

A promotion group enables you to apply or modify promotion tactics to a number of products at once.

Creating and Editing Promotion Groups

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

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

To create promotion groups:

1. Click Promotion Program on the springboard.
2. Select a promotion program from the list.
3. Click Create, and enter values in the fields, as defined in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Group</td>
<td>This is the broad category or the logical grouping of the products to which you want to apply the promotion tactics and evaluation metrics.</td>
</tr>
<tr>
<td>Product name</td>
<td>This is the search criterion to group products in a promotion group. Alternatively, you can also use Product ID as the search criterion.</td>
</tr>
<tr>
<td>Discount Method</td>
<td>Based on the selection of your discount method, enter the amount or percentage in the relevant field.</td>
</tr>
</tbody>
</table>

Optionally, you can specify the following:

a. Funding Method: Off Invoice or Bill Back.
4. Click Save.

This action submits your query to populate products that meet the search criterion that you have specified in the Product Name field.
5. 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.
At this point, consider the following before you proceed:

- Click **Create** to add individual items to the group.
- Review the items and remove the ones that you do not want.
- Change the discount of individual products. For example, you may want to decrease the discount on premium woolen 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%.

## Deleting 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 does not 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.

## Managing Volume Discount Promotion

Volume discount is a type of promotion where the discount is based on the quantity the customer is purchasing. Volume discount type has two subtypes:

- **Stair**: The quantity will point 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 will point to a range in the discount range table. The discount 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 it falls in the range of 101-150, the discount range applied will be the one that falls in the range prior to 101-150, say 51-99. The quantities that are in excess of 99 but lesser than 101-150, will be 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 options like **Stair** and **Step** and the discount method from drop-down options like amount or percentage.

   To create a discount range click the Discount Ranges subtab and click **Create**.

2. Adding products to the promotion.
3. Assigning the promotion to account.
4. Adding the promotion to the shopping cart.
5. Deleting the promotion.
Managing Dynamic Combo Promotion

Dynamic combo promotion includes multiple product groups for which the purchase quantity requirement must be met at the group level. Within each group, the sales representative can select the quantity of individual products as long as the total quantity of all the products in the group meet the required quantity for the group.

Dynamic combo promotion has two subtypes - Dynamic Combo and Rebate Discount. Rebate discount works exactly like Dynamic Combo. Its rebate calculation should be calculated outside of the Consumer Goods solution. The rebate discount subtype indication is only used for tracking purposes.

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

1. Creating 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.
   
   You can manage combination groups by selecting the Combination Groups subtab and clicking Create.
   
   Enter the combination group quantity, currency and so on and click Save and Close.

2. Adding products to the promotion.

3. Assigning the promotion to accounts.

4. Adding the promotion to the shopping cart.

5. Deleting the promotion.

Managing Fixed Combo Promotion

Fixed combo discount is a type of promotion where the group of SKUs are bundled and sold together and cannot be altered by the sales representative. The sales representative can only enter the quantity of fixed combinations that the customer is purchasing.

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

1. Creating a fixed combo type promotion.

   You can manage combo groups by selecting the Combo Groups subtab and clicking Create.

   Enter the combination group quantity, currency and so on and click Save and Close

2. Adding products to the promotion.

3. Assigning the promotion to accounts.

4. Adding the promotion to the shopping cart.

5. Deleting the promotion.

Allocating Funds to Promotions

Account managers can allocate funds to promotions. The amount required for the promotion will be deducted from the fund associated with your account. Multiple promotions can be associated with a fund.
To create a fund, see the Managing Budgets and Funds section in the Oracle Using Sales for Consumer Goods guide.

To allocate funds to a promotion:

1. Sing in to Oracle Sales Cloud using the account manager role.
2. Navigate to Promotions and select the promotion to which you want to allocate funds to.
3. Navigate to the Accounts subtab and perform the following steps:
   a. Click Add to search for the account that is 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.
4. Navigate to the Fund Allocation subtab and click Create.
5. On the Create Fund Allocation page, you must specify the following information and click Save and Close:
   o Select the trade fund from which you want to allocate funds to the promotion.

   ✍ Note: You must select an active fund.
   o Specify the amount which you want to allocate for the promotion.
6. Click Submit > Save.

   ✍ Note: Once a promotion is submitted, the promotion status is automatically changed to approved. The fund allocation is automatically approved once the associated promotion is submitted.
7. 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 is approved for the promotion.

Related Topics

• Using Budgets and Funds: Example

Evaluating Trade Promotions

The account manager can evaluate the efficacy of a promotional activity with the help of evaluation metrics based on which the promotional activity can be modified to meet the organizational targets.

To evaluate the performance of a promotion, select promotion and click on the Summary subtab to view the figures for evaluation.

The metrics are calculated from the following formulas:

✍ Note: To calculate these metrics, the account manager must enter the baseline sales, projected lift percentage and gross margin for each 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.


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 %)) will give 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 like 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

The investment return in percentage from trade spend.

Incremental Profits/Trade Spend will give the return on investment.
12 Working with Claims and Deductions

Managing 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

A new claim can be created by the partner sales manager, partner sales administrator and sales representatives roles.

To create a new claim:

1. Sign in as the partner manager.
2. Click the Claims icon from the springboard.
3. Click Create and enter the required details such as account, currency, and so on.
4. 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 new claim items.

To create claim items:

a. Navigate to the Claims Summary page and select the Claim Items subtab.
b. Click Create to create new 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 and can be deleted only until it is the draft status. Once a claim has been submitted, claim resolution can be done for it. You can create and delete claim items for a claim in the draft status only. When the claim amount is equal to the sum of all resolution amounts in the Approved status, the status of the claim is changed to resolved.

Claim Resolution

Once a draft claim is submitted, the account manager, channel operations manager or sales administrator can create resolution records for the claim. The following are the two types of resolutions:

- Funded Payment: This is the portion of the claim amount to be paid to the customers and sourced from an approved fund allocation. Funded payment resolutions can be associated to approved fund allocations only.
- Reject: This is the portion of the claim amount that was rejected.

To create a claim resolution:

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

   An open claim is a claim that is in the submitted or in-progress status.
2. Click the resolutions subtab.
3. Click Create and enter values for fields like amount, resolution type and so on and click Save and Close.
   You will be navigated to the Resolutions subtab.
4. 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 Sales Cloud Partner Relationship Management module. 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 status of the deduction is changed to resolved.
4. Select Submit and Save.

Managing Deductions

You can create deductions for trade activity expenses and resolve them using fund allocations.

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

- Deduction creation
- Deduction resolution

Deduction Creation

A new deduction can be created by the partner sales manager, partner sales administrator and sales representatives roles.

To create deductions:

1. Sign in as the account manager.
2. Select the Deductions icon from the springboard.
3. Select Create and select the mandatory details such as account, reason code and currency from the drop-down lists.
4. 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 can be deleted only until it is the draft status. Once a deduction has been submitted, deduction resolution can be done for it. 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.
Deduction Resolution

Once 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**: This is the portion of the deduction amount to be paid to the customers and sourced from existing fund allocations.
- **Unfunded Payment**: This is the portion of the deduction amount that could not be sourced from existing fund allocations but was approved as a valid expense.
- **Charge back**: This is the portion of the deduction amount that was rejected.
- **Write-Off**: This is the portion of the deduction amount that wasn’t sourced from the existing fund allocations.

To create a deduction resolution:

1. Sign in as the account manager. Navigate to an open deduction.
   
   An open deduction is a deduction that is in the submitted or in-progress status.
2. Click the resolutions subtab.
3. Click **Create** and enter values for fields like amount, resolution type and so on and click **Save and Close**.
   
   You will be navigated to the Resolutions subtab.
4. 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 Sales Cloud Partner Relationship Management module. 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. Sign in as the account manager.
2. Click the deductions icon and click the deduction record to edit.
3. 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 resolution amounts in the Approved status, the status of the deduction is changed to resolved.
4. Select **Submit** and **Save**.
13 Working with Inventory and Orders

Managing Inventory and Orders: Overview

The following sections provide details about managing inventory and orders.

Managing Inventory

You can audit your store inventory to ensure there is a sufficient stock of your products at the retail store.

You typically perform the following:

- Assess or audit the inventory including viewing the information about the previous audits. Only those changes that are saved at the time of check out 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.

Managing Orders

As a sales person, 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.

Performing Inventory Audits

You must sign in using a field sales representative or a sales manager role to perform inventory audit.

To perform inventory audit for an account:

1. On the springboard, click Activities.
2. Double-click your current appointment.
3. On the edit page, click the name of the linked account.
4. Select the Inventory subtab.
5. Provide the inventory details for your required product.

Among other details, you typically provide the product name, and provide or adjust the shelf stock, facing, and location of the product. Ensure that the shelf stock is greater than or equal to the facing products.

6. Click Save and Close.
Ordering 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.

Creating an Order

To create an order from the shopping cart, click Create Order from the overflow menu. Click Save to complete the transaction. This will empty your shopping cart.

For more information on creating shopping cart, see the Using Sales for Consumer Goods guide.

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.

Related Topics

- Working with Shopping Cart and Shopping Cart Template in Oracle Sales Cloud for Consumer Goods

Canceling Orders

You can cancel the orders that are in the open and submitted status. The Oracle CX Retail Execution 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 acceptance of an order cancellation is done by the ERP application.
  
  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.

Revising Orders

This feature enables the telesales agent to 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**.
14 Settling Routes

Settling Route Inventories

A direct store delivery solution requires planning for getting the goods from the distribution centers to the stores and this movement is organized in routes.

At the end of the day a settlement process is performed to verify all payments and supporting documentation for all transactions in detail. Once 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 Sales Cloud Using Retail Execution Mobile guide.

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 Sales Cloud Using Retail Execution 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 Sales Cloud Using Retail Execution 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 Sales Cloud Using Retail Execution Mobile guide.

Related Topics

- Managing My Inventory in Oracle CX Retail Execution Mobile
Printing the Route Settlement Report

Consumer goods cashiers 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 sales representative to sign.
  - Space for the consumer goods cashier to sign.

To print the route settlement report:

1. Sign in to Oracle Sales Cloud 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.

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, the Print Route Settlement Dashboard must be refreshed before the next print.

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

Working with the Route Settlement Report: Example

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 would be considered as a missing payment.

Viewing the Route Settlement Report

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

1. Sign in to Oracle Sales Cloud using the consumer goods cashier role.
2. Navigate to Routes and select the route for which the route settlement report has been submitted.
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.

Verifying 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
   o 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:
   o Verify the types of expenses incurred during the route and the amount spent on expenses.
   o 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 is not 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 once 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 is not calculated as shortage.

Settling Payments and Closing 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 sales representative creates a route settlement report and records all the payments and supporting documents. In addition to recording payment information of the deliveries, the route settlement report also records bank deposit, expenses, and inventory shortage or overage occurred during the route. After the route settlement report is filled by the sales representative, the consumer goods cashier verifies all payments and supporting documentation using the route settlement report. Once the verification is complete, the consumer goods cashier closes the route settlement report.

Understanding the Route Settlement Report

Sales representatives can receive payments in the form of bank deposits. The bank deposit information for each route is set up by the sales administrators or by custom integration. The mobile application automatically populates the bank deposit information in the bank deposit record.

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deposit Bank Name</td>
<td>Name of the bank in which bank deposits for a route are deposited.</td>
</tr>
<tr>
<td>Reference Number</td>
<td>Unique identifier on the bank deposit receipt.</td>
</tr>
<tr>
<td>Deposit Bank Account Number</td>
<td>Unique identifier of the bank account in which payments for a route is deposited.</td>
</tr>
<tr>
<td>Deposit Bank Routing Number</td>
<td>Routing number of the bank in which the money was deposited.</td>
</tr>
</tbody>
</table>

Sales representatives also receive payments though various other methods which the consumer goods cashier must verify. During verification, information regarding each of these payments is either automatically populated or is populated by the consumer goods cashier.

The key fields which are used by the consumer goods cashier to verify payments are:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>Total amount received from a payment type.</td>
</tr>
<tr>
<td>Verified Total</td>
<td>Total verified amount for a payment type.</td>
</tr>
<tr>
<td>Due</td>
<td>Amount due from a payment type.</td>
</tr>
</tbody>
</table>
Field | Description
--- | ---
Verified Remaining | 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:

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

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

**Pre-Settlement**

Sales representatives use the mobile application to complete the pre-settlement process and create the route settlement report. The mobile application automatically records the payment information for calculating the expected amount for each payment type and generates the list of the expected supporting documentation.

Sales representatives manually record the information about the bills and coins received as part of cash payments and if supporting documentation is available for these payments. Sales representatives also use the mobile application to manually record information like 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**

Consumer goods 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 sales representative and verify these records against the documents submitted by the sales representative. The verified shortage or verified overage is recorded by the consumer goods cashier in case the verified balance of the route settlement is not zero.

**Missing Documents**

The route settlement report can only be closed by the consumer goods cashier when the verified balance is zero. Sometimes due to missing documents, the verified balance of a route settlement report is not zero.

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 does not impact the verified balance and the verified balance remains zero.
15 Reporting and Analytics

Using Sales Infolets Page

The following sections contain information on the analytics capabilities in Oracle Sales Cloud for Consumer Goods Retail Execution and Trade Promotions Management based on the key tasks that you must know about as a sales person.

The reporting and analytics capabilities in the consumer good solution enables sales managers and field sales representatives stay up to date on key performance indicators through a dashboard. You can use the infolets on the Sales Infolets page to quickly view important metrics related to appointments, accounts, promotions, tasks, and sales performance.

You can click on an infolet to drill down to the details to view the related transactional data including account specific.

Sales vs Target

This infolet shows a summary of the sales from all the orders vs the sales target and the resulting gap which can be positive or negative 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 for the sales manager and sales representative.

✏️ Note: The Sales vs Target infolet does not have a drill down from the 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 drill down from 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 in-flight promotions and total order amount originated from them in the current quarter. The detailed report shows a monthly breakdown of the total order amount generated from in-flight promotions. A drill down from the 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 drill down from the 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 per-account sales targets for the current month. Meeting targets can be defined 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 is 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 drill down from the detailed report lists all orders for the selected account.

**Eligible Promotions**

This infolet shows a count of eligible promotions in the current quarter. Eligible Promotion is a promotion that is active for at least one day in the quarter. Eligible promotions also include all in-flight promotions as only eligible promotions would be available for order capture.

The Detail report lists down the accounts with count of eligible promotions for each account. A drill down from the detail report lists all the eligible promotions for the selected account.

For more information on working with analytics and reports, see Oracle Sales Cloud 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.

**Related Topics**

- Oracle Sales Cloud Using Analytics and Reports guide.