

Oracle® Retail Merchandising Foundation Cloud Service Franchise User Guide



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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

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Preface

This document describes the Oracle Retail Merchandising user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

Audience

This document is for users and administrators of Oracle Retail Merchandising. This includes merchandisers, buyers, business analysts, and administrative personnel.

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- Exact error message received
- Screen shots of each step you take

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

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

<https://docs.oracle.com/en/industries/retail/index.html>

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

Conventions

The following text conventions are used in this document:

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

1

Franchise Overview

The franchise business model is typically used by retailers to scale up business operations and market presence, particularly in new markets. In this model, retailers may choose to utilize business partners called franchisees to manage branded or co-branded stores while retaining the retailer's business processes and value proposition. Franchisees may operate one or more stores under the retailer's banner. Franchise models can vary by geography, ease of market entry and line of business. There can also be variances in mode of profiting sharing (license fee vs % of profits vs preferential rates), inventory management (franchisee managed as opposed to franchiser managed), and so on. The Merchandising system supports a franchise model that offers customer management, franchise costing and both retailer-managed as well as franchisee-managed inventory capabilities. A comprehensive description of the Franchise Management features available in Merchandising can be found in the *Franchise Management* whitepaper.

2

Manage Franchise Customers

Franchise Customers are typically business entities who manage branded or co-branded stores with the retailer, while retaining the retailer's business processes and value propositions. Each franchise customer can operate one or more stores for the retailer for which inventory may or may not be managed by the retailer. These franchise locations are set up as stores in Merchandising to ease the process of ordering and fulfilling of franchise orders. Merchandising maintains customer groups and customers pertaining to franchise operations as a hierarchy above the franchise locations, which are created as stores.

Franchise customer groups provide the ability to group customers owned by a larger group. If you do not have a multi-tiered structure for your franchise customers, then customer and customer groups can be created as a one-to-one relationship. Customer groups can also be used as a grouping mechanism while defining cost-build-up templates for uniformity in costing. Definition of franchise customer groups is mandatory to set up franchise customers in Merchandising.

Once a customer group is defined, customers belonging the customer group can be set up in the Merchandising system. Multiple customers can be associated under a single customer group, but a given customer can only belong to a single customer group.

Franchise customers and customer groups can be created and managed using the spreadsheet download and upload processes, which are accessed through the main Merchandising task list under **Foundation Data > Download Foundation Data** and **Foundation Data > Upload Foundation Data** respectively. Navigate to **Foundation Data > Download Foundation Data**, choose the Template Type of **Franchise** and the Template titled **Franchise Customers** to download existing customer data.

Add a Franchise Customer Group

To add a new franchise customer group, start in the Franchise Customer Group tab. Add a new row by selecting the action type of Create and enter the ID for the new group that you wish to add, using up to 10 numeric digits. Next proceed to enter the Franchise Customer Group Name. Translations of the Customer Group Name can be defined in the Franchise Customer Group translations tab. For each new language in which a translation is to be defined, add a row with an action type of Create, select the language code and enter the customer Group ID for which the translation is being defined together with the translated name. There are no significant validations for uploading a new Franchise Group apart from validating that the Customer Group ID is unique.

Add a Franchise Customer

To add a new franchise customer, start in the Franchise Customer tab. Add a new row by selecting the action type of Create and enter the ID for the new customer that you wish to add, using up to 10 numeric digits. Next proceed to enter the Franchise Customer Name. Other key details that you will need to enter include:

- Credit indicator - Indicate whether the Franchise Customer has good credit. Franchise Ordering will be restricted for Customers with poor credit. Valid values are Yes and No.

- Customer Group ID - Enter the ID of a valid Franchise Customer Group to which the customer is associated.
- Auto Approve Indicator - Indicates if externally uploaded Franchise Orders should be automatically approved for this customer or not. Valid values are Yes and No.

Translations of the Customer Name can be defined in the Franchise Customer translations tab. For each new language in which a translation is to be defined, add a row with an action type of Create carrying the language code and the customer ID for which the translation is being defined together with the translated name. There are no significant validations for uploading a new Franchise customer apart from validating that the customer is unique and associated with a valid Franchise Customer Group.

Update Franchise Customers and Franchise Customer Groups

If you would like to update any Customer or Customer Group details, a similar process will be followed as described above for creating new Franchise Customer Groups. First, download the Franchise Customer spreadsheet, and then navigate to the tab where you would like to make your updates. The following columns can be updated in each tab:

- Franchise Customer Groups – Customer Group Name
- Franchise Customer Groups Translation – Customer Group Name
- Franchise Customers – Customer Name, Credit Indicator, Customer Group ID, Auto Approve Indicator
- Franchise Customer Translations – Customer Name

In the tab where you are going to make your updates, select the action type of Update on rows that you wish to update and then correct the value in the spreadsheet. Once your updates are complete, save and close the spreadsheet.

Delete Franchise Customers and Franchise Customer Groups

If you wish to delete a Franchise Customer Group or Franchise Customer or its associated translation record because it is not used by your business, update the action column to select Delete for those rows in each of the tabs where it occurs. This includes Franchise Customer Groups, Franchise Customers and their respective translation tables. Care should be taken before deleting a Franchise Customer or Franchise Customer group to ensure that it is not used and does not have active transactions referencing it in the system. If associated records exist then an error could be raised on upload.

Upload Changes

For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and select **Foundation Data > Upload Foundation Data** from the main task list. In this screen, you'll again select the template type **Franchise** and the template **Franchise Customers**. This will generate a process description automatically, but this can be

updated if desired. Lastly, you'll select the **Browse** button and navigate to the directory where you saved the updated spreadsheet.

To review the status of the upload and check whether any errors occurred, select the **Foundation Data > Review Status** task from the main task list. For more information, see "[View Data Loading Status](#)" in the *Oracle Retail Merchandising Do the Basics User Guide*.

3

Manage Franchise Costs

The Franchise Cost Template is used to apply the same pricing concept to multiple item/franchisee location combinations. Each template defines the method by which costing for the Franchisee will be calculated. The Franchise Cost Templates page allows you to view, edit, or create cost templates used to determine customer costs for franchise.

The following template types are available:

- Margin then Up Charges
- Up Charges then Margin
- Percent off Retail
- Fixed Cost



Figure 3-1 Franchise Cost Template Page

The screenshot shows a web interface for managing franchise cost templates. The main section is titled "Template 27361". It contains a "Description" field with a search icon, a "Type" section with four radio buttons: "Margin then Up Charges" (selected), "Up Charges then Margin", "Percent Off Retail", and "Fixed Cost", and a "Margin Percent" field. Below this is an "Up Charges" section with a toolbar containing icons for adding, deleting, copying, pasting, and detaching. A table with the following columns is shown: "Up Charge", "Description", "Calculation Basis", "Rate", "Per Count", "Per Count UOM", and "Currency". The table is currently empty, displaying "No data to display." At the bottom right, there are buttons for "Save", "Save and Close", and "Cancel", along with a help icon.

Template

The Template section contains the template ID that is automatically generated. Depending on the calculation type selected, the section contains the following fields. The system defaults to the Margin then to the Up Charges type.

Table 3-1 Template - Fields and Description

Fields	Description
Description	Enter a description. This field is a required field.
Translate icon 	You can create a translation by using the Translate icon  .
Type	Select the method by which the costing will be calculated. The following template types are available: <ul style="list-style-type: none"> • Margin then Up Charges • Up Charges then Margin • Percent Off Retail • Fixed Cost
Margin Percent	Only available if you select one of the following template types: <ul style="list-style-type: none"> • Margin then Up Charges The Margin Percent field is a required field for this template type. • Up Charges then Margin Enter the margin in percent.
Percent Off Retail	Only available if you select the template type Percent Off Retail. Enter the percent off retail used to calculate the customer cost for an item. This field is a required field.
Fixed Cost	Only available if you select the template type Fixed Cost. Enter the fixed cost. This field is a required field.
Final Cost checkbox	Only available if you select the template type Fixed Cost. You can define the final customer cost for an item. Select the Final Cost check box. The Final Cost option signifies if this is the final cost for the item/franchise location or deal pass through will have to be applied on the cost to derive the final customer cost for the item/franchise location.

Up Charges

The Up Charges section contains the list of up charges associated with the template. This section is only available when the template type is either **Margin then Up Charges** or **Up Charges then Margin**. You can add new up-charges or delete existing up-charges from the template in this section.

Create a Franchise Cost Template


To create a franchise cost template, follow the steps below.

1. From the Tasks menu, select **Inventory > Franchise Orders > Create Cost Template**. The Franchise Cost Template page appears.
2. Enter the required fields.
3. Then choose one of the following options.

- Click **Save** to save the franchise cost template.
- Click **Save and Close** to save the template and close the page.
- Click **Cancel** to reject all entries and close the page.

Add Up Charges to a Franchise Cost Template

To add up charges to a franchise cost template, follow the steps below. This section is only available when the template type is either **Margin then Up Charges** or **Up Charges then Margin**.

1. In the Up Charges section, select **Actions > Add**, or use the Add icon . The Add Up Charges pop-up appears.
2. In the **Up Charges** field, enter, select or search for the up charge you want to add to the template. This field is a required field.
3. Then choose one of the following options.
 - Click **OK** to add the up charge and close the pop-up.
 - Click **OK and Add Another** to add additional up charges
 - Click **Cancel** to reject all entries and close the pop-up.

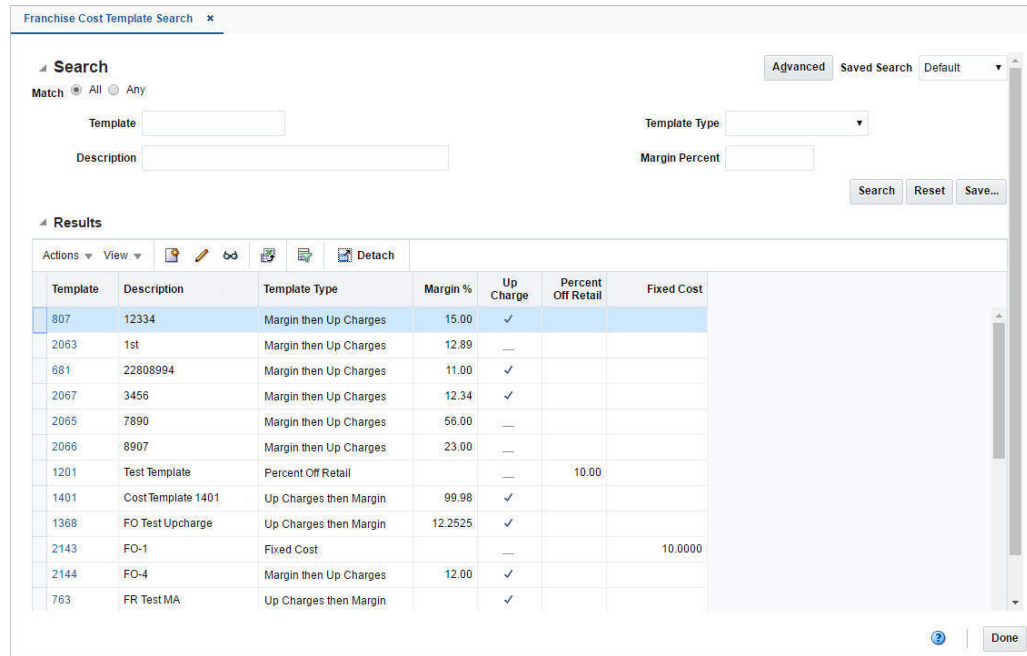
Manage a Cost Template

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

- Search for cost templates by various search criteria
- View search results
- View cost template information
- Create cost templates
- Edit cost templates
- Export Query Results to Excel

You can access the Franchise Cost Template Search page from the Task menu, select **Inventory > Franchise Orders > Manage Cost Template**. The Franchise Cost Template Search page appears.

Figure 3-2 Franchise Cost Template Search Page



Search for a Franchise Cost Template

To search for a franchise cost template:

1. From the Task menu, select **Inventory > Franchise Orders > Manage Cost Templates**. The Franchise Cost Template Search page appears.
2. You can search for a franchise cost template using basic or advanced search criteria, depending on the requirement. The basic mode is the default search mode.
 - Click **Advanced** to access the search section in advanced mode.
 - Click **Basic** to return to basic mode.

Search for a Franchise Cost Template Through the Basic Search Criteria

To search for a franchise cost template using basic search criteria:

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

Table 3-2 Franchise Cost Template Search - Basic Search Criteria and Description

Fields	Description
Match option	Check radio button All or Any. All - only franchise cost templates matching all entered search criteria are shown. Any - franchise cost templates matching any of the entered search criteria are shown.

Table 3-2 (Cont.) Franchise Cost Template Search - Basic Search Criteria and Description

Fields	Description
Template	Enter the template ID.
Description	Enter the template description.
Template Type	Select the template type from the list.
Margin Percent	Enter the margin in percent.

- Click **Search**. The franchise cost templates that match the search criteria are displayed in the Results section.
- Click **Reset** to clear the search section and results.
- Click **Done** to close the page.


Search for a Franchise Cost Template through Advanced Search Criteria

To search for a franchise cost template using advanced search criteria:

- To search using advanced search criteria, enter or select one or all of the advanced search criteria.
- To narrow down the search, use the list next to the search fields. For example, determine if the entered value should equal or not equal the search result.
- Click **Search**. The franchise cost templates that match the search criteria are displayed in the Results section.
- Click **Reset** to clear the search section and results.
- Click **Add Fields** to add more fields for the advanced search. To remove the field from the search, click the x right next to the field.
- Click **Done** to close the page.

Edit a Franchise Cost Template

To edit a franchise cost template, follow the steps below.

- From the Tasks menu, select **Inventory > Franchise Orders > Manage Cost Template**. The Franchise Cost Template Search page appears.
- Enter or select search criteria to make the search more restrictive.
- Click **Search**. The franchise cost templates that match the search criteria are displayed in the Results section.
- Select a franchise cost template in the Results section.
- Then select **Actions > Edit**, or use the Edit icon , or click on the template link. The Franchise Cost Template page appears.
- Edit the information in the individual sections.
For more information about the available sections of the Franchise Cost Template page, see the [Manage Franchise Costs](#) section.
- Then choose one of the following options.

- Click **Save** to save your changes.
- Click **Save and Close** to save your changes and close the page.
- Click **Cancel** to reject all entries and close the page.

Franchise Cost Relationships

The Franchise Cost Relationships page allows you to maintain the franchise cost relationships between departments/items and locations.

Figure 3-3 Franchise Cost Relationships

Department	Class	Subclass	Subclass Name	Item	Item Description	Location	Template	Template Description	Start Date	End Date
9121	912	912	SubClass	126850001	TEST	4444	2147	fc	8/16/16	8/18/16
4415						1001	301	Sample Template	8/9/16	8/10/16
4415						666	301	Sample Template	8/9/16	8/10/16
4415						5555	301	Sample Template	8/9/16	8/10/16
4415						6666	301	Sample Template	8/9/16	8/10/16
4415						7892	301	Sample Template	8/9/16	8/10/16
4415						7588481	301	Sample Template	8/9/16	8/10/16
7486	4889	3432	Subclass	104350064	Upgrade	909890	2148	Franchise_Order	8/1/16	8/31/16
4415						121234	301	Sample Template	7/14/16	7/15/16
4415						1001	301	Sample Template	7/14/16	7/15/16
4415						5555	301	Sample Template	7/14/16	7/15/16
4415						6666	301	Sample Template	7/14/16	7/15/16
4415						666	301	Sample Template	7/14/16	7/15/16
4415						7588481...	301	Sample Template	7/14/16	7/15/16
4415						12123	301	Sample Template	7/14/16	7/15/16
4415						1000000...	301	Sample Template	7/14/16	7/15/16
4415						7892	301	Sample Template	7/14/16	7/15/16
4415	2461					12123	461	sample template	7/3/16	7/4/16
4415						12123	301	Sample Template	7/3/16	7/4/16
4415	2461					7588481...	461	sample template	7/3/16	7/4/16
4415	2461	4252	Oracle Retail USA	103350361	TEST	5555	1122	test333	7/3/16	7/4/16

The table contains the cost templates associated with a department/class/subclass or item for one or more franchise stores. You can only associate an item with a template if the selected template uses the fixed cost pricing method. These relationships, which also include start and end dates, are used to calculate the pricing cost for franchise stores.

Add Cost Relationships

To add cost relationships, follow the steps below.


1. From the Tasks menu, select **Inventory > Franchise Orders > Cost Relationships**. The Franchise Cost Relationships page appears.
2. In the table, select **Actions > Add**, or use the Add icon . The Add Relationships pop-up appears.

Figure 3-4 Add Relationship Pop-Up

The screenshot shows a dialog box titled "Add Relationship" with a close button in the top right corner. The dialog contains the following fields and controls:

- * Template:** A text input field containing "1201" and a dropdown arrow. To its right is the label "Template".
- * Department:** A text input field with a dropdown arrow.
- Class:** A text input field with a dropdown arrow.
- Subclass:** A text input field with a dropdown arrow.
- * Location:** A text input field with a dropdown arrow, followed by a second text input field with a dropdown arrow.
- * Start Date:** A text input field with a calendar icon.
- * End Date:** A text input field with a calendar icon.

At the bottom right of the dialog are three buttons: "OK", "OK and Add Another", and "Cancel".

- a. In the **Template** field, enter, select or search for the template. This field is a required field.
- b. In the **Department** field, enter, select or search for the department you want to associate the template with. This field is a required field.
- c. In the **Class** field, enter, select or search for the class.
- d. In the **Subclass** field, enter, select or search for the subclass.
- e. In the **Location** field, select the location type from the list. Then enter, select or search for the location. This field is a required field.
- f. In the **Start Date** field, enter the start date or use the Calendar icon to select a date. This field is a required field.
- g. In the **End Date** field, enter the end date or use the Calendar icon to select a date. This field is a required field.
- h. Then choose one of the following options.
 - Click **OK** to add the cost relationship to the table and close the pop-up.
 - Click **OK and Add Another** to add additional cost relationships.
 - Click **Cancel** to reject all entries and close the pop-up.

Edit Cost Relationships

To edit cost relationships, follow the steps below.

1. From the Tasks menu, select **Inventory > Franchise Orders > Cost Relationships**. The Franchise Cost Relationships page appears.


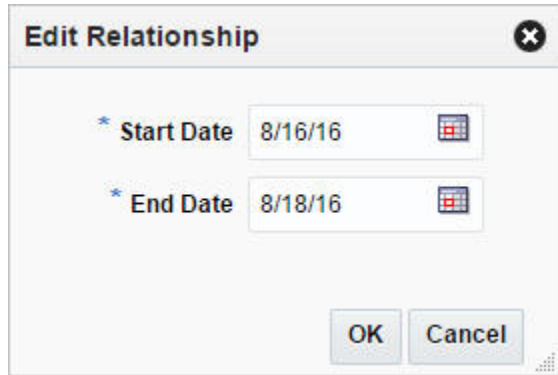
2. Select a record in the table.
3. Then select **Actions > Edit**, or use the Edit icon . The Edit Relationships pop-up appears. The start and end date of the selected template are displayed.

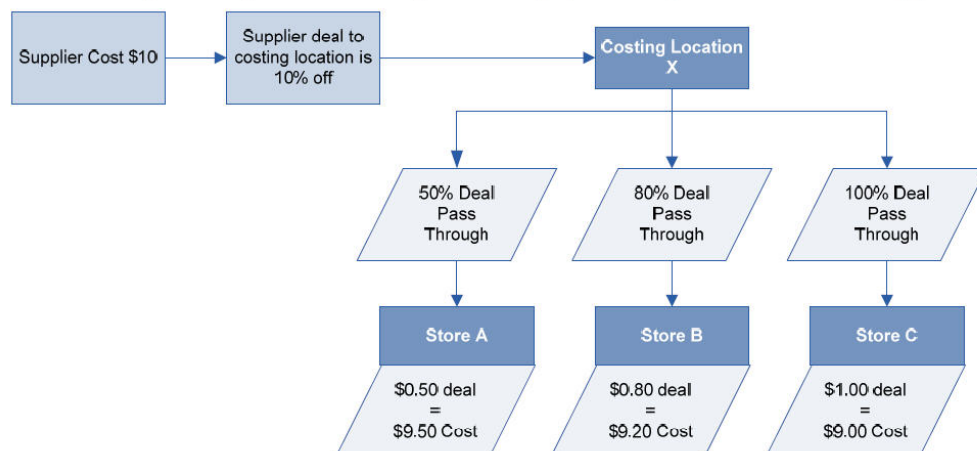
Figure 3-5 Edit Relationship Pop-Up



- a. In the **Start Date** field, edit the start date, if necessary.
- b. In the **End Date** field, edit the end date, if necessary.
- c. Then choose one of the following options.
 - Click **OK** to save your changes and close the pop-up.
 - Click **Cancel** to reject all entries and close the pop-up.

Manage Deal Pass Through

Suppliers often provide off-invoice deals to promote purchases by retailers. These purchase related benefits can be further passed through from the retailer to the franchise customer. The retailer may opt to pass through a full or a partial benefit to the franchise customer. The Merchandising system provides an option to define this deal pass-through percentage by department/supplier/costing location for each franchise store. The diagram below depicts a simple example of how this pass through percentage is calculated and applied.



Deal pass through percentages can be defined and managed using the spreadsheet download and upload processes, which are accessed through the main Merchandising task list under **Foundation Data > Download Foundation Data** and **Foundation Data > Upload Foundation Data** respectively. Navigate to **Foundation Data > Download Foundation Data**, choose the Template Type of **Franchise** and the Template titled **Deal Pass Through** to download existing pass through data.

Add a Deal Pass Through Definition

To add a new Deal Pass through definition, start in the Deal Pass Through tab. Add a new row by selecting the action type of Create and enter the department, supplier, costing location and location combination for which the deal pass through is being defined and the pass through percentage applicable for deals involving this combination of entities. There are no significant validations for uploading a new deal pass through definition apart from validating that the department, supplier, costing location and location values supplied in the spreadsheet are valid and that the pass through % does not exceed 100%.

Update a Deal Pass Through Definition

If you would like to update any of the deal pass through related details, a similar process will be followed as that described above for creating new definitions. First, download the Deal Pass Through spreadsheet, and then navigate to single tab in the spreadsheet where you would like to make your updates. Only the deal pass through % can be updated as part of the deal pass through definition. For the rows wherein the pass through % is intended to be updated, select the action type of Update, and then correct the value in the spreadsheet. Once your updates are complete, save and close the spreadsheet.

Delete a Deal Pass Through definition

If you wish to delete a deal pass through definition because it is not used by your business, update the action column to Delete against the rows in the Deal Pass Through tab that are to be deleted. Care should be taken before deleting a deal pass through definition as it can directly impact the pricing cost for a franchise customer.

Upload Changes

For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and select **Foundation Data > Upload Foundation Data** from the main task list. In this screen, you'll again select the template type **Franchise** and the template **Deal Pass Through**. This will generate a process description automatically, but this can be updated if desired. Lastly, you'll select the **Browse** button and navigate to the directory where you saved the updated spreadsheet.

To review the status of the upload and check whether any errors occurred, select the **Foundation Data > Review Status** task from the main task list.

For more information, see "[Download Data](#)," "[Data Upload](#)," and "[View Data Loading Status](#)" in the *Oracle Retail Merchandising Do the Basics User Guide*.

4

Franchise Orders

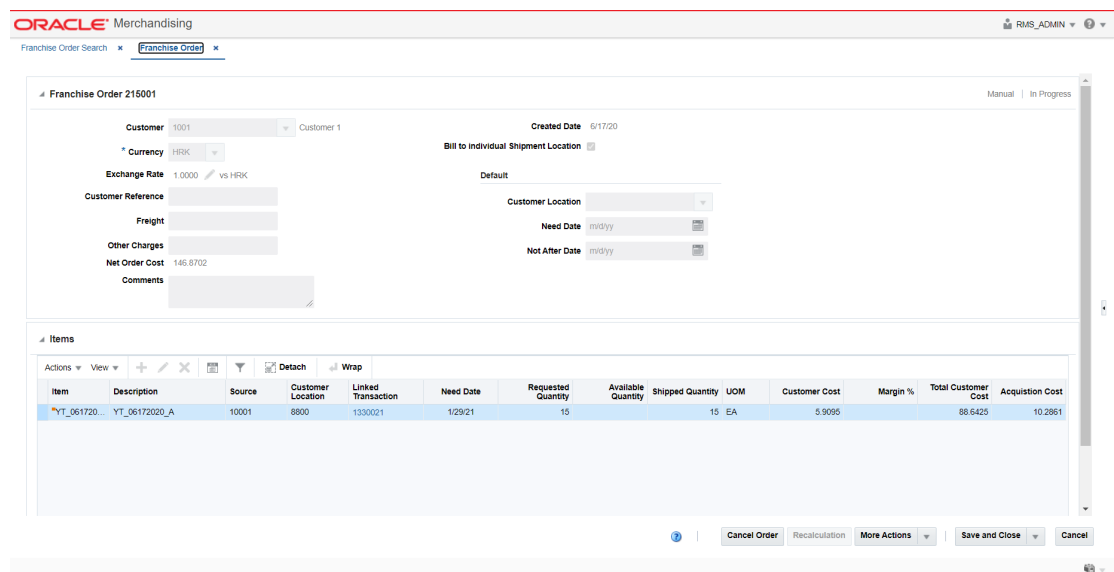
Franchise orders, which are considered sales orders between the retailer and the franchise customer, need to be raised in order to fulfill demand from a franchise customer. A franchise order contains the item requisition to be sourced from a certain location (supplier, company warehouse or store) and fulfilled at one or more franchise stores by one or more required need dates. A franchise order also contains the price at which the items on the order will be sold to the franchise customer.

The Franchise Orders page allows you to take orders from franchise customers and fulfill those orders from store or warehouse inventory or by orders from suppliers.

The Franchise Order page contains the following sections.

- [Franchise Order](#)
- [Items](#)
- [Bill to Address](#)

Figure 4-1 Franchise Order Page



Franchise Order

The title of the Franchise Order section contains the franchise order ID by default. Additionally, the order type and order status are displayed in the right hand corner.

The section contains the following fields.

Table 4-1 Franchise Order - Fields and Description

Fields	Description
Customer	Enter, select or search for the customer.
Currency	Enter, select or search for the currency for the order. This field is a required field.
Exchange Rate	Enter exchange rate to convert from Franchise Order Currency to currency of Locations on the Franchise Order
Customer Reference	Enter a customer reference.
Freight	Enter any freight charges associated to the franchise order.
Other Charges	Enter other miscellaneous charges associated to the franchise order.
Net Order Cost	Displays the net order costs.
Comments	Enter comments for the franchise order, if necessary.
Created Date	Displays the order create date.
Cancel Reason	Displays the cancel reason. This field is displayed when the Franchise Order has been cancelled at the header level. Only 40 characters of the cancel reason are displayed.
Bill to individual Shipment Location checkbox	This checkbox is selected by default. If not selected, the Bill to Address section is displayed and expanded, otherwise, the Bill to Address section is cleared, collapsed and hidden. For more information about the Bill to Address section, see the Bill to Address section.
Default:	
Customer Location	Enter, select or search for the customer location.
Need Date	Enter, select or search for the need date.
Not After Date	Enter, select or search for the date or use the Calendar icon to select a date.

Items

The Items section contains information on the items on the order such as the item number, item description, customer location, and linked transactions like transfers or orders. The table also contains quantity and cost information.

Additionally, you can add, edit and delete items from the franchise order in this section. You can also view cost details and the stock on hand of the selected item.

Items - Actions Menu and Icons

Use the Actions Menu and icons to apply actions to the table. You can perform the actions listed below, as well as actions described in "[Action Menu and Icons](#)" in the *Oracle Retail Merchandising Do the Basics User Guide*.

Table 4-2 Items - Actions Menu/Icons and Description

Actions Menu/Icons	Description
Cost Details	<p>Opens the Cost Details pop-up. To view the cost details of an item on the franchise order:</p> <ul style="list-style-type: none"> • Select a record in the Items section. • Select Actions > Cost Details. The Cost Details pop-up appears. • View the cost buildup information for the selected item on the franchise order. • Click OK to close the pop-up.
Stock on Hand	<p>Opens the Inventory by Location pop-up.</p> <p>For more information about this pop-up, see View Inventory by Location in the <i>Oracle® Retail Merchandising Inventory User Guide</i>.</p>

Franchise Order Transfers

The **Linked Transaction** column displays the order, transfer or allocation associated to the Franchise Order. For associated transfers and orders this column contains an order number or transfer number link. This link takes you to the Order or Transfer page.

For line items with multiple associated transfers, this field displays 'Multiple', instead of showing the transfer number link.

Click 'Multiple', and the Franchise Order Transfers page opens. The page displays all the transfers associated to the line item. The table shows the following columns:

- Transfer
- Created Date
- Delivery Date
- Status

Click **Done** to close the page.

Bill to Address

The Bill to Address section is only available if the **Bill to individual Shipment Location** checkbox is not selected in the Franchise Order section. In this section you can specify a bill to address for the franchise order.

- In the **Default Bill Location** field, enter, select or search for the location.
- In the **Bill to Address** field, enter, select or search for an address.

Figure 4-2 Bill to Address Section

Franchise Order Toolbar

The toolbar contains the following icons and buttons, as well as icons and buttons described in “[Screen Level Action - Icons and Buttons](#)” in the *Oracle Retail Merchandising Do the Basics User Guide*.

Table 4-3 Franchise Order Toolbar - Icons/Buttons and Description

Icons/Buttons	Description
Status	<p>If you click the Status button, the status of the franchise order changes to the status specified on the button.</p> <p>Possible franchise order statuses are:</p> <ul style="list-style-type: none"> • Input • Approved • In Progress • Cancelled • Closed • Pending Credit Approval
Recalculation	<p>Opens the Order Recalculation pop-up. This pop-up allows you to scale, or undo scaling of the supplier sourced franchise orders.</p> <p>For more information about how to recalculate franchise orders, see the Recalculate Franchise Orders section.</p>
More Actions	<p>Click More Actions to see a list of additional actions that can be performed in the Franchise Order page.</p> <ul style="list-style-type: none"> • Shipments Opens the Shipment List pop-up. For more information about viewing shipments of a franchise order, see Order Shipments in the <i>Oracle® Retail Merchandising Purchase Orders and Contracts User Guide</i>. • Returns Opens the Franchise Return Search pop-up. For more information about how to search for returns, see the Manage a Franchise Return section. • Currency Toggle between the system's primary currency and the currency of the order.

Table 4-3 (Cont.) Franchise Order Toolbar - Icons/Buttons and Description

Icons/Buttons	Description
Save and Create Another	Click Save and Create Another to save the entered records and add additional entries. This option is only available, if you create a new expense profile.
Save and Edit Another	Click Save and Edit Another to save the entered records and edit additional entries. This option is only available in Edit mode.
Done	If you open the page in view mode, the Done button is displayed. Click Done to close the page.

Create a Franchise Order

To create a franchise order, follow the steps below.

1. From the Tasks menu select, **Inventory > Franchise Orders > Create Order**. The Franchise Order page appears.
2. Enter the franchise order information, as required.

For more details about the available fields in this section, see the [Franchise Order](#) section.

For more information about how to add items to a franchise order, see the [Add Items to a Franchise Order](#) section.

3. Then choose one of the following options.
 - Click **Save** to save the current franchise order.
 - Click **Save and Close** to save the current franchise order and close the page.
 - Click **Save and Create Another** to create additional franchise orders.
 - Click **Cancel** to reject all entries and close the page.

Add Items to a Franchise Order

You can add the following item types to a franchise order:

- Item or Reference Item
To add an item or a reference item, see the [Add an Item or Reference Item](#) section.
- Item as a Complex Buyer Pack Item with the Order Type of Eaches
To add a complex buyer pack item, see the [Add a Complex Buyer Pack Item](#) section.
- Item Parent or Item List
To add a parent item, see the [Add a Parent Item](#) section.
To add an item list, see the [Add an Item List](#) section.

Add an Item or Reference Item

To add an item or a reference item, follow the steps below.


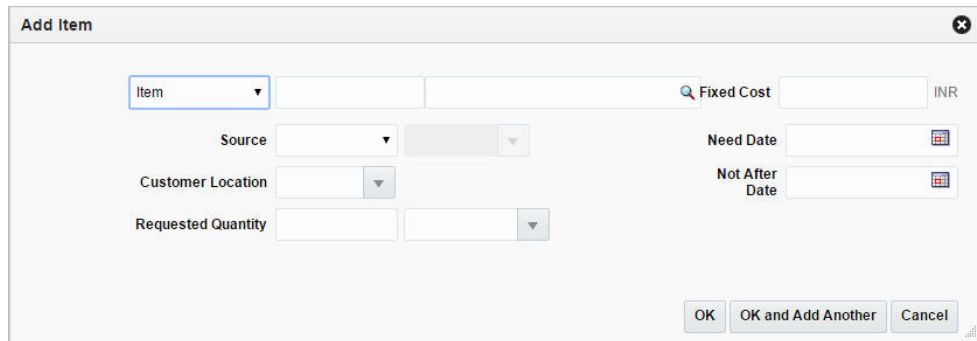
1. In the Items section, select **Action > Add**, or use the Add icon . The Add Item pop-up appears.

Figure 4-3 Add Item Pop-Up



- a. In the **Item** field, select the item type from the list. Then enter or search for the item or reference item.
- b. In the **Source** field, select the source from the list. Then enter, select or search for the source.
- c. In the **Customer Location** field, enter, select or search for the customer location.
- d. In the **Requested Quantity** field, enter the quantity. Select the unit of measure.
- e. In the **Fixed Cost** field, enter the fixed cost for the item.


 **Note:**

A fixed cost value overrides the customer cost computed through templates. This field is an optional field.

- f. In the **Need Date**, enter the need date or use the Calendar icon to select a date.
- g. In the **Not After Date**, enter the date or use the Calendar icon to select a date.
- h. The **Supplier Pack Size** field, displays the pack size of the selected supplier. This field is only displayed, if you select supplier as a source type.
- i. Then choose one of the following options.
 - Click **OK** to add the current item to the table.
 - Click **OK and Add Another** to add additional items.
 - Click **Cancel** to reject all entries and close the pop-up.

Add a Complex Buyer Pack Item

To add a complex buyer back item to a franchise order, follow the steps below.

1. In the Items section, select **Action > Add**, or use the Add icon . The Add Item pop-up appears.
 - a. In the **Item** field, select Item as the item type from the list. Then enter or search for a complex buyer pack item.
 - b. In the **Source** field, select the source from the list. Then enter, select or search for the source.
 - c. In the **Customer Location** field, enter, select or search for the customer location.
 - d. In the **Requested Quantity** field, enter the quantity. Select Eaches as unit of measure.
 - e. In the **Fixed Cost** field, enter the fixed cost for the item.
 - f. In the **Need Date** field, enter the need date or use the Calendar icon to select a date.
 - g. In the **Not After Date** field, enter the date or use the Calendar icon to select a date.
 - h. The **Supplier Pack Size** field, displays the pack size of the selected supplier. This field is only displayed, if you select supplier as a source type.
 - i. Click **Display Items**. In the Distribute Complex Buyer Pack section all the components of the complex buyer pack item are displayed.

 **Note:**

The table will only be populated when you have entered a requested quantity.

- j. In the **Quantity** column enter the distribution quantity as required for the component items.
- k. Then choose one of the following options.
 - Click **OK** to add the current item to the table.
 - Click **OK and Add Another** to add additional items.
 - Click **Cancel** to reject all entries and close the pop-up.

Add a Parent Item

To add a parent item to a franchise order, follow the steps below.


1. In the Items section, select **Action > Add**, or use the Add icon . The Add Item pop-up appears.

Figure 4-4 Add Item Pop-Up - Item Parent

Item Parent 102200003 **Parent Item**

Source Warehouse 11112 **Warehouse**

Customer Location 7085 **Franchise**

Requested Quantity 10.00 **EA** **Each**

Fixed Cost **USD**

Need Date 10/13/16

Not After Date 10/21/16

▲ Distribute Item

Distribute By Ratio Percent Quantity

Actions

Item Parent	Item	Description	Diff 1	Diff 2	Diff 3	Diff 4	Ratio	Quantity
102200003	102250001	Child Item					1	10.00
								10.00

- a. In the **Item** field, select the Item Parent as the item type from the list. Then enter or search for the item.
- b. In the **Source** field, select the source from the list. Then enter, select or search for the source.
- c. In the **Customer Location** field, enter, select or search for the customer location.
- d. In the **Requested Quantity** field, enter the quantity. Select Eaches as the unit of measure.
- e. In the **Need Date** field, enter the need date or use the Calendar icon to select a date.
- f. In the **Not After Date** field, enter the date or use the Calendar icon to select a date.
- g. The **Supplier Pack Size** field, displays the pack size of the selected supplier. This field is only displayed, if you select supplier as a source type.
- h. Click **Display Items**. In the Distribute Item section all the children of the selected parent item are displayed.
- i. In the Distribute Item section, choose one of the following distribution methods.
 - Choose **Ratio**. Then enter the ratio for the individual child items in the ratio column.
 - Choose **Percentage**. Then enter the percent for the individual child items in the percentage column.
 - Choose **Quantity**. Then enter the quantity for the individual child items in the quantity column.
- j. Click **Distribute** to distribute the items according to the entered ratio or percentage.


 **Note:**

The Distribute button is not available, if you have selected the distribution method Quantity.

- k. Then choose one of the following options.
 - Click **OK** to add the current item to the table.
 - Click **OK and Add Another** to add additional items.
 - Click **Cancel** to reject all entries and close the pop-up.

Add an Item List

To add an item list to a franchise order, follow the steps below.

1. In the Items section, select **Action > Add**, or use the Add icon . The Add Item pop-up appears.
 - a. In the **Item** field, select Item List as the item type. Then enter or search for the item list.
 - b. In the **Source** field, select the source from the list. Then enter, select or search for the source.
 - c. In the **Customer Location** field, enter, select or search for the customer location.
 - d. In the **Requested Quantity** field, enter the quantity. Then select the unit of measure.
 - e. In the **Need Date** field, enter the need date or use the Calendar icon to select a date.
 - f. In the **Not After Date** field, enter the date or use the Calendar icon to select a date.
 - g. The **Supplier Pack Size** field, displays the pack size of the selected supplier. This field is only displayed, if you select supplier as a source type.
 - h. Click **Display Items**. In the Distribute Item section all the items of the selected item list are displayed.
 - i. In the Distribute Item section, choose one of the following distribution methods.
 - Choose **Ratio**. Then enter the ratio for the individual child items in the ratio column.
 - Choose **Percentage**. Then enter the percent for the individual child items in the percentage column.
 - Choose **Quantity**. Then enter the quantity for the individual child items in the quantity column.
 - j. Click **Distribute** to distribute the items according to the entered ratio or percentage.

 **Note:**

The Distribute button is not available, if you have selected the distribution method Quantity.

- k. If one of the items in the item list is a complex buyer pack item, the Distribute Complex Buyer Pack section is displayed. This section displays all the components of the complex buyer pack item.

 **Note:**

The table will only be populated when you have entered a requested quantity.

- l. In the **Quantity** column enter the distribution quantity as required for the component items.
- m. Then choose one of the following options.
 - Click **OK** to add the current item to the table.
 - Click **OK and Add Another** to add additional items.
 - Click **Cancel** to reject all entries and close the pop-up.

Manage a Franchise Order

The Manage Franchise Orders option opens the Franchise Order Search page. In this page you can perform the following actions.

- Search for franchise orders by using various search criteria
- View the search results
- View franchise order information
- Create a franchise order
- Edit franchise order information

You can access the Franchise Order Search page from the Task menu, by selecting **Inventory > Franchise Orders > Manage Franchise Orders**. The Franchise Order Search page appears.

Figure 4-5 Franchise Order Search Page

Search for a Franchise Order

To search for a franchise order:

1. From the Task menu, select **Inventory > Franchise Orders > Manage Orders**. The Franchise Order Search page appears.
2. You can search for a franchise order using basic or advanced search criteria, depending on the requirement. The basic mode is the default search mode.
 - Click **Advanced** to access the search section in advanced mode.
 - Click **Basic** to return to basic mode.

Search for a Franchise Order Through the Basic Search Criteria

To search for a franchise order using basic search criteria:

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

Table 4-4 Franchise Order Search - Basic Search Criteria and Description

Fields	Description
Match option	Check radio button All or Any. All - only franchise orders matching all entered search criteria are shown. Any - franchise orders matching any of the entered search criteria are shown.

Table 4-4 (Cont.) Franchise Order Search - Basic Search Criteria and Description

Fields	Description
Status	Select the status of the franchise order from the list.
Customer	Enter, select or search for the customer.
Supplier Site	Enter, select or search for the supplier site.
Supplier Site Name	Enter the supplier site name.
Item	Enter, select or search for the item of the order.
Item Description	Enter the item description.
Store	Enter, select or search for the store.
Warehouse	Enter, select or search for the warehouse.
Customer Location	Enter, select or search for the customer location.

2. Click **Search**. The franchise orders that match the search criteria are displayed in the Results section.
3. Click **Reset** to clear the search section and results.
4. Click **Done** to close the page.

Search for a Franchise Order Through Advanced Search Criteria

To search for a franchise order using advanced search criteria:

1. To search using advanced search criteria, enter or select one or all of the advanced search criteria.
2. To narrow down the search, use the list next to the search fields. For example, determine if the entered value should equal or not equal the search result.
3. Click **Search**. The franchise orders that match the search criteria are displayed in the Results section.
4. Click **Reset** to clear the search section and results.
5. Click **Add Fields** to add more fields for the advanced search. To remove the field from the search, click the x right next to the field.
6. Click **Reorder** to change the order of the available search fields. The Reorder Search Fields pop-up appears.
 - Select the desired search field and use the up and down arrows to rearrange the order of the fields.
 - Click **OK** to confirm the new order of the fields and close the pop-up.
 - Click **Cancel** to reject any changes and close the pop-up.
7. Click **Done** to close the page.

Results

The Results section lists the retrieved franchise orders. The following columns are displayed by default.

- Order Number

- Customer
- Customer Location
- Customer Location Name
- Source
- Source Name
- Need Date
- Status
- Total Order Cost
- Currency

Franchise Order Search Toolbar


The toolbar contains the following button, as well as icons and buttons described in “[Screen Level Action - Icons and Buttons](#)” in the *Oracle Retail Merchandising Do the Basics User Guide*.

Table 4-5 Franchise Order Search Toolbar - Icons/Buttons and Description

Icons/Buttons	Description
Done	Click Done to close the page.

Edit a Franchise Order

To edit a franchise order, follow the steps below.

1. From the Tasks menu, select **Inventory > Franchise Orders > Manage Orders**. The Franchise Order Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The franchise orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Franchise Order page appears.
5. Edit the fields as necessary.

For more details about the available fields in this section, see the [Franchise Order](#) section.

 **Note:**

You can add new items to a franchise order in Input status. For more information about adding items to a franchise order, see the [Add Items to a Franchise Order](#) section.

For existing items on an order, you can modify the Fixed Cost, Requested Quantity, Need Date, and Not After Date when the order is in Input status.

In Approved status, you can modify the Requested Quantity and Fixed Cost.

You can modify the Requested Quantity in the In Progress status.

For more information about how to edit items on a franchise order, see the [Edit Items on a Franchise Order](#) section.

6. Then choose one of the following options.
 - Click **Save** to save your changes to the franchise order.
 - Click **Save and Close** to save your changes to the franchise order and close the page.
 - Click **Save and Edit Another** to edit additional franchise orders.
 - Click **Cancel** to reject all entries and close the page.

Edit Items on a Franchise Order

To edit items on a franchise order, follow the steps listed below.


1. Select a record in the Items section.
2. Then select **Action > Edit**, or use the Edit icon . The Edit Item pop-up appears.

Figure 4-6 Edit Item Pop-Up

- a. Edit the following fields, as necessary.
 - **Requested Quantity**
 - **Fixed Cost**
 - **Need Date**
 - **Not After Date**
- b. In the **Cancel Reason** field, select reason for cancelling the item, if necessary.

 **Note:**

This field is only available when the order status is Approved or In Progress, and the entered requested quantity is less than the original requested quantity, otherwise this field is not available.

- c. Then choose one of the following options.
 - Click **OK** to add your changes to the table.
 - Click **Cancel** to reject all entries and close the pop-up.

Recalculate Franchise Orders

To change the scaling or to undo the scaling of the franchise order, follow the steps below.

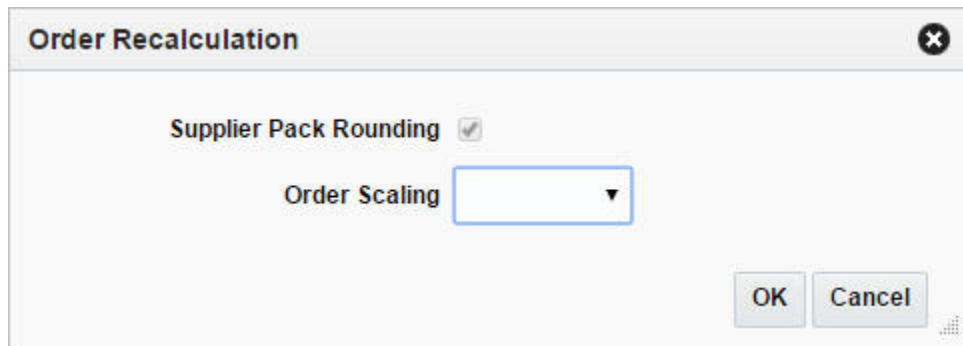
1. In the Franchise Order page, select a record in the Items section.

 **Note:**

The Recalculation function is only available if the selected order line item is sourced from a supplier.

2. Then select the **Recalculation** button. The Order Recalculation pop-up appears.

Figure 4-7 Order Recalculation Pop-Up



- a. The **Supplier Pack Rounding** checkbox is selected by default.
- b. In the **Order Scaling** field, select one of the following options.
 - Select **Scale Order** to scale the order.
 - Select **Undo Order Scaling** to revert any scaling done for this order.
- c. Then choose one of the following options.
 - Click **OK** to save your changes.
 - Click **Cancel** to reject all entries and close the pop-up.

Cancel a Franchise Order

To cancel a franchise order, follow the steps below.


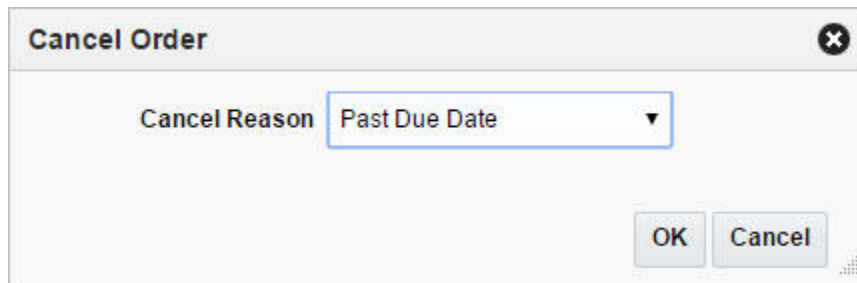
1. From the Tasks menu, select **Inventory > Franchise Orders > Manage Orders**. The Franchise Order Search page appears.
2. Restrict your search to franchise orders with the status Approved, In-Progress, or Pending Credit.
3. Click **Search**. The franchise orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Franchise Order page appears.
5. Select **Cancel Order**. The Cancel Order pop-up appears.

Figure 4-8 Cancel Order Pop-Up



- a. In the **Cancel Reason** field, select a reason for cancelling the order from the list.
- b. Then choose one of the following options.
 - Click **OK** to cancel the franchise order and close the pop-up.

 **Note:**

For franchise orders in Approved status the entire ordered quantity is canceled. For orders in In Progress status only the outstanding quantity is cancelled.

- Click **Cancel** to reject your entries and close the pop-up.

5

Franchise Return

Franchise Returns are defined as any return of stock from a franchise store to a company warehouse or store. The return can contain items from multiple orders, but must be from a single franchise store.

Two different types of returns can be created: either a return that brings inventory back to a company store or warehouse, or a return for which the returning store will destroy the goods on site. The latter may be used in the case where the goods are damaged beyond repair or perishable, such that the retailer does not want to take them back into inventory, but has agreed to refund the franchise customer.

Figure 5-1 Franchise Return Page

Franchise Return x

RMA 2747 EDI | Input

Customer 1001 | Customer 1 Created Date 4/19/16

Customer Location 987987 | Franchise Store Comments chicken sandwich

Return Location 4756 | Store

Return Method Return to Location

Currency USD

Customer Reference 23456

Items

Order No.	Item	Description	Return Reason	Returned Quantity	Unit Return Cost	Unit Restock Fee	Restocking Type	VAT	Final Return Cost	Total Return Cost
2646	400000019017	Reg item with different UOM	Overstock	19.9900	0.9870	10.0000	Percent	0.0000	0.8883	17.7571

17.7571

Approve More Actions Save and Close Cancel

Return Merchandise Authorization (RMA)

The RMA (Return Merchandise Authorization) section includes the RMA number in the title. The return type and status is displayed in the right hand corner of the section.

The RMA section contains the following fields.

Table 5-1 RMA - Fields and Description

Fields	Description
Customer	Displays the customer.
Customer Location	Displays the customer location.
Return Location	Displays the return location.
Return Method	Displays the return method.
Currency	Displays the currency of the franchise return.
Customer Reference	Displays the customer reference, if available. This field remains enabled until the franchise return is approved.
Create Date	Displays the date the franchise return has been created.
Cancel Reason	Displays the cancel reason. This field is only displayed when the franchise return has been cancelled at the header level. Only 40 characters of the cancel reason are displayed.
Transfer	Displays the transfer number linked to the return. The transfer number link takes you to the Transfer page in view mode. This field is only available when the franchise return has been approved.
Comments	Displays comments for the franchise return.

Items

In the Items section you can add or maintain the items for the franchise return.

Items - Actions Menu and Icons

Use the Actions Menu and icons to apply actions to the table. You can perform the actions listed below, as well as actions described in "[Action Menu and Icons](#)" in the *Oracle Retail Merchandising Do the Basics User Guide*.

Table 5-2 Items - Actions Menu/Icons and Description

Actions Menu/Icons	Description
Mass Update and Mass Update button	Opens the Mass Update pop-up. This option is only available for franchise returns in Input status. For more information about the mass update option, see the Apply a Mass Update for Items on a Franchise Return section.
Stock on Hand	Opens the Inventory by Location page. For more information about this page, see View Inventory by Location in the <i>Oracle® Retail Merchandising Inventory User Guide</i> .

Franchise Return Toolbar

The toolbar contains the following icons and buttons, as well as icons and buttons described in “[Screen Level Action - Icons and Buttons](#)” in the *Oracle Retail Merchandising Do the Basics User Guide*.

Table 5-3 Franchise Return Toolbar - Icons/Buttons and Description

Icons/Buttons	Description
Status	<p>If you click the Status button, the status of the franchise return changes to the status specified on the button.</p> <p>Possible franchise return statuses are:</p> <ul style="list-style-type: none"> • Input • Approved • In Progress • Cancelled • Closed
More Actions	<p>Click More Actions to see a list of additional actions that can be performed in the Franchise Return page.</p> <ul style="list-style-type: none"> • Currency Toggle between the system's primary currency and the currency of the return.
Done	<p>If you open the page in view mode, the Done button is displayed.</p> <p>Click Done to close the page.</p>

Create a Franchise Return

To create a franchise return, follow the steps below.

1. From the Tasks menu, select **Inventory > Franchise Orders > Create Return**. The Create Return pop-up appears.

Figure 5-2 Create Return Pop-Up

The screenshot shows a 'Create Return' dialog box with the following fields and values:

- * Customer:** 1001 (dropdown menu shows 'Customer 1')
- * Customer Location:** 7085 (dropdown menu shows 'Demo Franchise')
- * Return Location:** Warehouse (dropdown menu), 841174355 (dropdown menu), 2a
- * Return Method:** Return to Location (dropdown menu)
- * Currency:** USD (dropdown menu)
- Customer Reference:** (empty text box)

Buttons: OK, Cancel

- a. In the **Customer** field, enter, select or search for the customer. This field is a required field.
- b. In the **Customer Location** field, enter select or search for the customer location. This field is a required field.
- c. In the **Return Location** field, select a return location type from the list. Then enter, select or search for the return location. This field is a required field.
- d. In the **Return Method** field, select if you want to return the item to the location or destroy the item on site. This field is a required field.
- e. In the **Currency** field, enter, select or search for the currency of the franchise return. This field is a required field.
- f. In the **Customer Reference** field, enter a customer reference, if available.
- g. Then choose one of the following options.
 - Select **OK** to create the franchise return and close the pop-up. The Franchise Return pop-up appears in a new tab. The RMA section of the pop-up contains the information you have entered.

For more information about the Franchise Return pop-up, see the [Franchise Return](#) section.
 - Then add items to the franchise return. For more information about how to add items to the franchise return, see the [Add Items to a Franchise Return](#) section.



Note:

Select **Cancel** to reject all entries and close the pop-up.

Add Items to a Franchise Return

To add an item to a franchise return, follow the steps below.


1. In the Items section, select **Actions > Add**, or use the Add icon . The Add Item pop-up appears.

Figure 5-3 Add Item Pop-Up

- a. In the **Order No.** field, enter, select or search for the franchise order number. This field is a required field.
- b. In the **Item** field, select if you want to return an item or reference item. Then enter, select or search for the item. This field is a required field.
- c. The following fields are populated, depending on the selected item.
 - **Order Cost**
If the selected item is a component of a pack item on the order, the cost is calculated based on its percentage of the pack item.
If the selected item is both a component of a pack item on the order and a regular item on the order, the regular item's cost is the cost displayed as the order cost.
 - **Ordered Quantity**
If the selected item is a component of a pack item on the order, the ordered quantity is calculated based on the pack item.
If the selected item is both a component of a pack item on the order and a regular item on the order, the ordered quantity displays the sum of the component pack item and the regular item on the order.
- d. In the **Unit Return Cost** field, enter the unit return cost. This field is a required field.
- e. In the **Return Reason** field, select a return reason from the list.
- f. In the **Returned Quantity** field, enter the return quantity.
- g. In the **Restocking Fee** field, select either the restocking type percent or specific amount from the list. Then enter the desired value.
- h. Then choose one of the following options.
 - Click **OK** to add the item and close the pop-up.
 - Click **OK and Add Another** to add additional items to the franchise return.

- Click **Cancel** to reject all entries and close the pop-up.
2. In the Franchise Order Return pop-up, choose a saving option to save your franchise return.

Manage a Franchise Return

The Manage Franchise Returns option opens the Franchise Return Search page. In this page you can perform the following actions.

- Search for franchise returns by various search criteria
- View the search results
- View franchise return information
- Create a franchise return
- Edit franchise return information

You can access the Franchise Return Search page from the Task menu, select **Inventory > Franchise Orders > Manage Franchise Returns**. The Franchise Return Search page appears.

Figure 5-4 Franchise Return Search Page

The screenshot shows the 'Franchise Return Search' interface. At the top, there are search mode options: 'Advanced', 'Saved Search', and 'Default'. Below this, there are search criteria fields: 'RMA', 'Return Location', 'Customer', 'Customer Location', 'Status', 'Order No.', and 'Item'. There are 'Search', 'Reset', and 'Save' buttons. The 'Results' section contains a table with the following data:

RMA	Customer	Customer Location	Customer Location Name	Return Location	Return Location Name	Return Method	Status	Total Return Amount	Currency
321	1001	1001	ReSA 16.0 Franchise Store Stock ...	11112	Virtual_Warehouse	Return to Location	Closed	0.0000	AUD
326	1001	1001	ReSA 16.0 Franchise Store Stock ...	11112	Virtual_Warehouse	Return to Location	Closed	0.0000	INR
485	1001	1001	ReSA 16.0 Franchise Store Stock ...	1000	ReSA 16.0 Multi Chan...	Return to Location	Closed	0.0000	AUD
646	1001	1001	ReSA 16.0 Franchise Store Stock ...	341341	Virtual_Warehouse	Return to Location	Closed	50.0000	USD
665	1001	1001	ReSA 16.0 Franchise Store Stock ...	11112	Virtual_Warehouse	Return to Location	Closed	-2.0000	AUD
768	1001	1001	ReSA 16.0 Franchise Store Stock ...	341341	Virtual_Warehouse	Return to Location	Closed	0.0000	USD
770	1002	5555	Non Stockholding Franchise store	11113	Virtual_Warehouse1	Destroy on Site	Closed	0.0000	INR
805	1002	5555	Non Stockholding Franchise store	5599	INR Virtual WH	Return to Location	In Progress	132.8665	INR
811	1002	5555	Non Stockholding Franchise store	5599	INR Virtual WH	Return to Location	In Progress	133.1450	INR
888	1001	1001	ReSA 16.0 Franchise Store Stock ...	11112	Virtual_Warehouse	Return to Location	In Progress	4.4475	USD

Search for a Franchise Return

To search for a franchise return:

1. From the Task menu, select **Inventory > Franchise Orders > Manage Returns**. The Franchise Return Search page appears.
2. You can search for a franchise return using basic or advanced search criteria, depending on the requirement. The basic mode is the default search mode.

- Click **Advanced** to access the search section in advanced mode.
- Click **Basic** to return to basic mode.

Search for a Franchise Return Through the Basic Search Criteria

To search for a franchise return using basic search criteria:

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

Table 5-4 Franchise Return Search - Basic Search Criteria and Description

Fields	Description
Match option	Check radio button All or Any. All - only franchise returns matching all entered search criteria are shown. Any - franchise returns matching any of the entered search criteria are shown.
RMA	Enter the RMA.
Return Location	Enter, select or search for the return location.
Customer	Enter, select or search for the customer.
Customer Location	Enter, select or search for the customer location.
Supplier Site	Enter, select or search for the supplier site.
Supplier Site Name	Enter the supplier site name.
Status	Select the status of the franchise return from the list.
Order No.	Enter, select or search for the order number.
Item	Enter, select or search for the return item.

2. Click **Search**. The franchise returns that match the search criteria are displayed in the Results section.
3. Click **Reset** to clear the search section and results.
4. Click **Done** to close the page.


Search for a Franchise Return Through Advanced Search Criteria

To search for a franchise return using advanced search criteria:

1. To search using advanced search criteria, enter or select one or all of the advanced search criteria.
2. To narrow down the search, use the list next to the search fields. For example, determine if the entered value should equal or not equal the search result.
3. Click **Search**. The franchise returns that match the search criteria are displayed in the Results section.
4. Click **Reset** to clear the search section and results.
5. Click **Add Fields** to add more fields for the advanced search. To remove the field from the search, click the x right next to the field.
6. Click **Done** to close the page.

Edit a Franchise Return

To edit a franchise return, follow the steps below.

1. From the Tasks menu, select **Inventory > Franchise Orders > Manage Returns**. The Franchise Return Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The franchise returns that match the search criteria are displayed in the Results section.
4. In the RMA column, click the RMA link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Franchise Return pop-up appears.
5. In the RMA section:
Edit the **Customer Reference** field, or a comment to the franchise return.

 **Note:**

You can only edit these fields when the franchise return is still in Input status.

6. In the Items section:
 - Add an Item
For more information about how to add an item to a franchise return, see the [Add Items to a Franchise Return](#) section
 - Edit an Item
For more information about how to edit an item on a franchise return, see the [Edit Items on a Franchise Return](#) section.
 - Delete an Item
 - Apply a Mass Update for all items on the franchise return
For more information about how to apply a mass update for items on a franchise order, see the [Apply a Mass Update for Items on a Franchise Return](#) section.

 **Note:**

You can only add, delete or apply mass updates for items on a franchise return when the return is still in Input status.

7. Then choose one of the following options.
 - Click **Save** to save your changes.
 - Click **Save and Close** to save your changes and close the pop-up.
 - Click **Cancel** to reject all entries and close the pop-up.

Edit Items on a Franchise Return

To edit an item on a franchise return, follow the steps below.


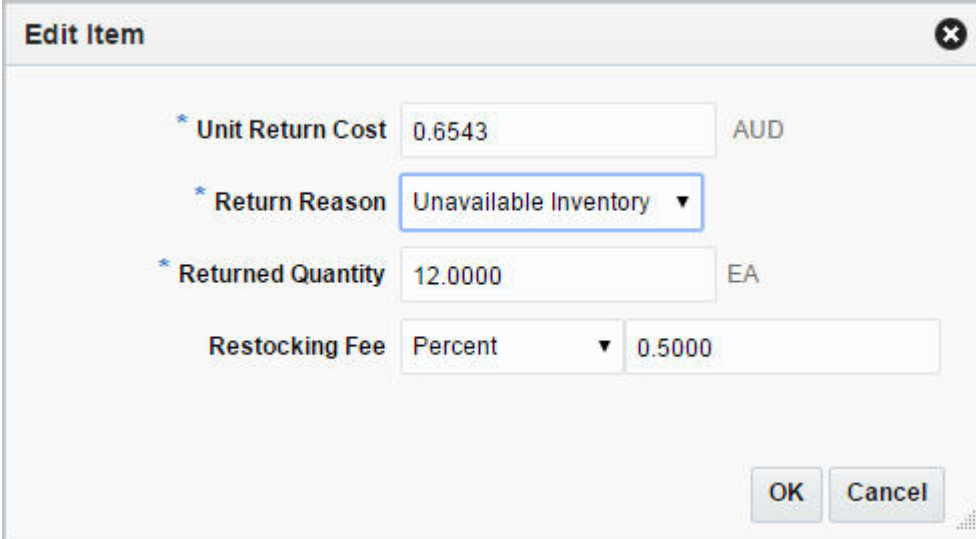
1. In the Items section, select **Actions > Edit**, or use the Edit icon . The Edit Item pop-up appears.

Figure 5-5 Edit Item Pop-Up



Edit Item

* Unit Return Cost 0.6543 AUD

* Return Reason Unavailable Inventory ▼

* Returned Quantity 12.0000 EA

Restocking Fee Percent ▼ 0.5000

OK Cancel

- a. Edit the following fields, as necessary.

- Unit Return Cost
- Return Reason
- Returned Quantity
- Restocking Fee
- Cancel Reason

This field is only available, if the franchise return is in Approved status and the returned quantity is less than the original quantity.

- b. Then choose one of the following options.

- Click **OK** to add your changes to the table.
- Click **Cancel** to reject all entries and close the pop-up.

Apply a Mass Update for Items on a Franchise Return

To apply a mass update for all items on the franchise return, follow the steps below.



Note:

This option is only available for franchise returns in Input status.

1. In the Items section, select **Actions > Mass Update**, or use the **Mass Update** button. The Mass Update pop-up appears.

Figure 5-6 Mass Update Pop-Up

The screenshot shows a 'Mass Update' dialog box. It has a title bar with the text 'Mass Update' and a close button (X). Below the title bar, there are two fields, both marked with an asterisk to indicate they are required. The first field is 'Restocking Type' with a dropdown menu currently showing 'Percent'. The second field is 'Restocking Fee' with a text input field containing the value '0.2000'. At the bottom right of the dialog, there are two buttons: 'OK' and 'Cancel'. There is also a small grid icon in the bottom right corner of the dialog area.

- a. In the **Restocking Type** field, select either the restocking type percent or specific amount from the list. This field is a required field.
- b. In the **Restocking Fee** field, enter the desired value.
- c. Then choose one of the following options.
 - Click **OK** to update the restocking type and fee for all items on the franchise return.
 - Click **Cancel** to reject all entries and close the pop-up.

Cancel a Franchise Return

To cancel a franchise order, follow the steps below.


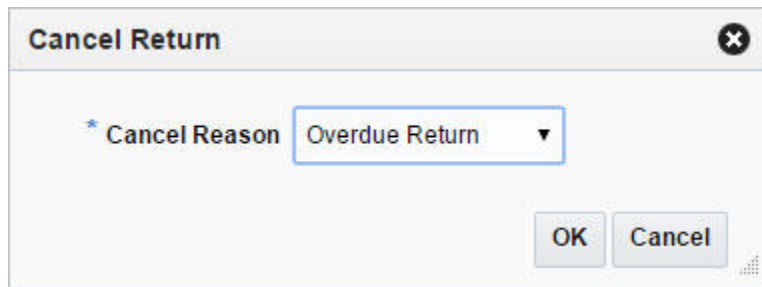
1. From the Tasks menu, select **Inventory > Franchise Orders > Manage Returns**. The Franchise Return Search pop-up appears.
2. Restrict your search to franchise returns with the status Approved and In Progress.
3. Click **Search**. The franchise returns that match the search criteria are displayed in the Results section.
4. In the RMA column, click the RMA number link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Franchise Return pop-up appears.
5. Select **Cancel Return**. The Cancel Return pop-up appears.

Figure 5-7 Cancel Return Pop-Up



The image shows a 'Cancel Return' pop-up dialog box. The title bar contains the text 'Cancel Return' and a close button (X). The main area of the dialog features a label '* Cancel Reason' followed by a dropdown menu. The dropdown menu is currently set to 'Overdue Return'. At the bottom right of the dialog, there are two buttons: 'OK' and 'Cancel'. A small help icon is visible in the bottom right corner of the dialog area.

- a. In the **Cancel Reason** field, select the reason for cancelling the franchise return.
- b. Then choose one of the following options.
 - Click **OK** to cancel the franchise return.
 - Click **Cancel** to reject your entry and close the pop-up.