Oracle® Retail Merchandising Foundation Cloud Service
Price Management User Guide

Release 23.0.101.0

ORACLE®

Oracle Retail Merchandising Foundation Cloud Service Price Management User Guide, Release 23.0.101.0

F76112-01

Contents

4   Manage Customer Segments

Send Us Your Comments

Oracle Retail Merchandising Foundation Cloud Service Price Management User Guide, Release 23.0.101.0

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document.

Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

> **✎ Note:**
>
> Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the Online Documentation available on the Oracle Technology Network Web site. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: retail-doc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at `http://www.oracle.com`.

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.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc`.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info` or visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs` if you are hearing impaired.

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

`https://support.oracle.com`

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Improved Process for Oracle Retail Documentation Corrections

To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times not be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Technology Network Web site, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

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

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

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.

If a more recent version of a document is available, that version supersedes all previous versions.

Oracle Help Center (docs.oracle.com)

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.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

View Price Change History

In the Price Change History page you can view the transactions for an item, the locations, pricing, and margins.

In this page you can perform the following actions.

- Search for transactions for an item, locations, pricing, and margins by using various search criteria
- View the search results

You can access the Price Change History page from the Task menu, select **Price > Price Change History**. The Price Change History page appears.

Figure 1-1   Price Change History Page

To look up price history:

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

Table 1-1   Price Change History Lookup - Search Criteria and Description

Fields	Description
Transaction Date	Enter a transaction date or use the Calendar icon to select a date.

Table 1-1 (Cont.) Price Change History Lookup - Search Criteria and Description

Fields	Description
Transaction Type	Select the transaction type from the list.
Location Type	Select a location type from the list. Then enter, select or search for the location ID.
Item/Item Parent	Select item or item parent from the list. Then enter, select or search for the item or item parent

2. Click **Lookup**. The transactions that match the search criteria are displayed in the Results section.

   • Click **Reset** to refresh the page. All entries are reset and not saved.

3. Click **Done** to close the page.

2

Manage Competitive Pricing

Competitive pricing is the process of reviewing prices offered by competitors in order to strategically set price points relative to competition. Competitive shop requests are created in the Competitor Shop Request page, and then once a shopper has performed a competitive shop, the competitive prices can be recorded. A history of the competitive prices is also retained which can be updated or deleted. This information is only available for reporting purposes in Merchandising.

Manage Competitors, Competitor Stores, and Shoppers

Competitors, competitor stores, competitor store associations with your stores, and competitive shoppers are maintained through the upload/download process. This functionality is accessed from the main Merchandising task list under Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data.

To add, update, or remove competitor information, select the template type of Price and Cost from the Download Data screen and then the template Competitors. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice.

Add a Competitor

To add a new competitor, start in the Competitor tab, and, in a blank line in the template, select the action type of Create. Next enter a unique competitor identifier (up to 10 digits) and the name for the competitor in the primary language (as defined in the Merchandising system options) of up to 120 characters. Optionally, you can also enter the address, phone, fax, website or jurisdiction of the competitor in the subsequent columns.

Next, the stores that belong in this competitor can be added. To do this, move to the Competitor Stores tab in the spreadsheet. Again, navigate to a blank row in the sheet and select an action type of Create. Enter the first store (up to 10 digits), along with your new competitor and the store's name and currency. The store name should be in the primary language (as defined in the Merchandising system options) and can be up to 150 characters. Optionally, you can also enter the store's address, phone, fax and additional store attributes. Continue this process until all the competitor stores for the competitor have been added. If you are adding a new competitor store to an existing competitor, this same process would apply, just using the existing competitor instead.

Next, you can associate your stores with competitor stores. To do this, move to the Store Associations tab in the spreadsheet. Again, navigate to a blank row in the sheet and select an action type of Create. Enter one of your stores you'd like to associate a competitor store. Next, enter the competitor store that you added in the Competitor Stores tab. The Target Competitor column, which determines which of the competitor stores is the target competitor for your store, must be set to Yes or No. Next enter the rank of the competitor store when compared to other competitor stores linked to your store. Lastly enter the distance between your store and the competitor's store along with the unit of measure in which the distance value was entered. Continue this process until all the competitor store associations have been made for your stores. If you are adding a new store association to an existing

competitor store, this same process would apply, just using the existing competitor store instead.

Lastly, you can add competitive shoppers. To do this, move to the Competitive Shoppers tab in the spreadsheet. Again, navigate to a blank row in the sheet and select an action type of Create. Enter the first shopper (up to 4 digits), along with a name. The shopper name should be in the primary language (as defined in the Merchandising system options) and can be up to 120 characters. Optionally, you can also enter the shopper's phone and fax. Continue this process until all competitive shoppers have been added.

Update a Competitor

If you would like to update any details for an existing competitor, a similar process will be followed as that described above for creating new competitors. First, download the spreadsheet, and then navigate to the tab where you would like to make your updates.

The following columns can be updated in each tab:

- Competitor - Competitor Name, Address 1, Address 2, Address 3, City, State, Country, Postal Code, Phone, Fax, Website, Jurisdiction

- Competitor Stores - Store Name, Address 1, Address 2, Address 3, City, State, Country, Postal Code, Phone, Fax, Website, Store Format, Currency, Total Area, Selling Area, Store Open Date, Store Close Date, Estimated Yearly Volume, Jurisdiction

- Competitor Store Associations - Target Competitor, Rank, Distance, Unit of Measure

- Competitive Shoppers - Shopper Name, Shopper Phone, Shopper Fax

In the tab where you are going to make your updates, select the action type of Update, and then correct the value in the spreadsheet.

Deleting a Competitor

If you wish to delete a competitor, update the action column to select Delete in each of the tabs where it occurs. Competitor stores for the competitor can be deleted from an existing competitor in a similar manner. A Competitor or competitor stores cannot be deleted if they are associated with a competitive shop request. Competitor store associations and competitive shoppers can also be deleted in a similar manner.

Uploading 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, select the template type Price and Cost and the template Competitor. This will generate a process description automatically, but this can be updated if desired. Lastly, 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.

See also Download/Upload Data from Spreadsheets and View Data Loading Status.

Manage Competitive Prices and History

Competitive prices and competitive price history are maintained through the download/upload process. This functionality is accessed from the main Merchandising task list under Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data.

To enter, update, or remove a competitive prices, select the template type of Price and Cost from the Download Data screen and then the template Competitive Prices. Optionally enter a specific competitor or department for which you wish to download competitive prices. Leaving these fields blank will download all competitive prices. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice.

Enter Competitive Prices

To enter the results of a competitive shop, first, download the spreadsheet, and then navigate to the Competitor Price Entry tab. Next, find the competitive shop details requested for the competitor, competitor store and item for which you wish to enter the competitor's price. Select the action type of Update and enter the date on which the competitor's price was recorded. Next, enter the competitive retail and price type, Regular, Clearance or Promotion. If applicable enter the competitor's multi unit retail and promotion offer dates and type in the subsequent columns. Continue this process until all competitive shop prices have been entered. After uploading all competitive shop prices can be reviewed, updated and deleted as Competitive Price History.

Update Competitive Price History

If you would like to update any details for historical competitor prices, a similar process will be followed as that described above for entering prices. First, download the spreadsheet, and then navigate to the Competitive Price History tab to make your updates.

The following columns can be updated:

• Competitor Retail, Price Type, Multi Units, Multi Unit Retail, Promotion Start Date, Promotion End Date, Offer Type

In the tab, select the action type of Update, and then correct the value in the spreadsheet.

Deleting Competitive Price History

If you wish to delete competitive price history, select the action type of Delete in each of the rows you wish to delete.

Uploading 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, select the template type Price and Cost and the template Competitive Prices. This will generate a process description automatically, but this can be updated if desired. Lastly, 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.

See also Download/Upload Data from Spreadsheets and View Data Loading Status.

Manage Competitor Price History

The Competitor Price History page you can perform the following actions.

- Search for competitor prices by various search criteria
- View the search results
- View competitor price information
- Edit competitor price information

You can access Competitor Price History page from the Task menu, select **Price > Competitor Price History**. The Competitor Price History page appears.

Figure 2-1   Competitor Price History
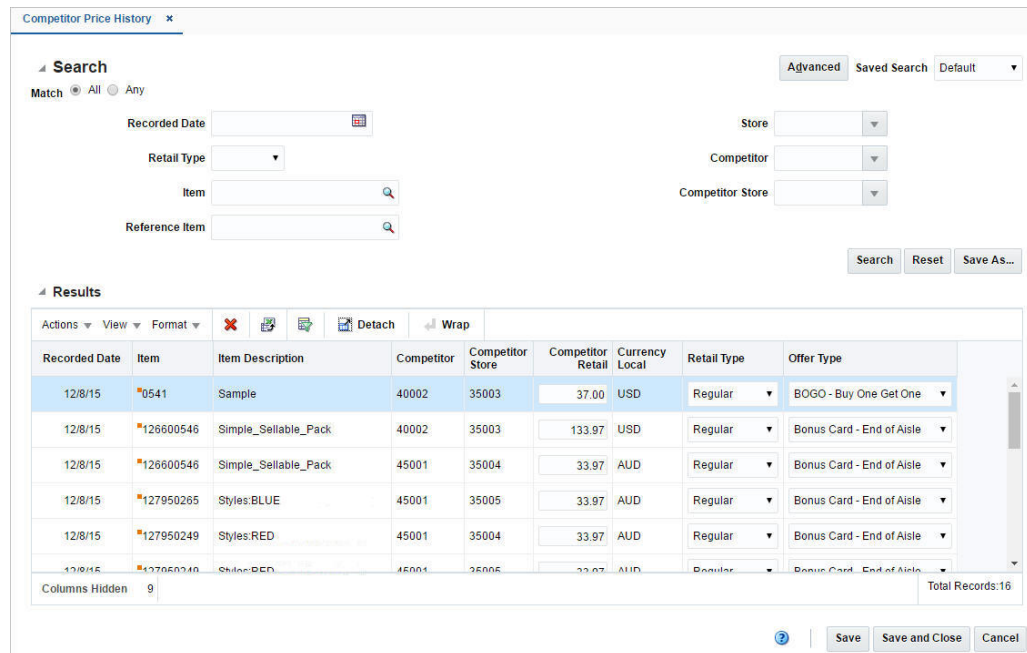
Searching for a Competitor Price

To search for a competitor price:

1. From the Task menu, select **Price > Competitor Price History**. The Competitor Price History page appears.

2. You can search for a competitor price 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 the basic mode.

Searching for a Competitor Price Through the Basic Search Criteria

To search for a competitor price using basic search criteria:

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

Table 2-1   Competitor Price History - Basic Search Criteria and Description

Fields	Description
Match option	Check radio button All or Any.
	All - only competitor price matching all entered search criteria are shown.
	Any - competitor prices matching any of the entered search criteria are shown.
Recorded Date	Enter a recorded date or use the Calendar icon to select a date.
Retail Type	Select a retail type from the list.
Item	Enter, select or search for an item.
Reference Item	Enter, select or search for the reference item.
Store	Enter, select or search for the store.
Competitor	Enter, select or search competitor.
Competitor Store	Enter, select or search for the competitor store.

2. Click **Search**. The competitor prices that match the search criteria are displayed in the Results section.

3. Click **Reset** to clear the search section and results.

   For more information about searches, see Search Screens in the *Oracle® Retail Merchandising Do the Basics User Guide*.

4. Click **Save As...** to save the current search criteria. The Create Saved Search page appears.

5. Click **Done** to close the page.

Searching for a Competitor Price Through Advanced Search Criteria

To search for a competitor price 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 competitor prices 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.

Editing a Competitor Price

To edit a competitor price, follow the steps below.

1. From the Tasks menu, select **Price > Competitor Price Change**. The Competitor Price History page appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The competitor prices that match the search criteria are displayed in the Results section.

   a. In the **Competitor Retail** column, enter the price for the item.

   b. In the **Retail Type** column, select the retail type from the list.

   c. In the **Offer Type** column, select the offer type from the list.

4. Then choose one of the following options.

   • Click **Save** to save your changes.

   • Click **Save and Close** to save your change and close the page.

   • Click **Cancel** to reject all entries and close the page.

Request a Competitive Shop

In the Competitor Shop Request page you can create a list of competitor's shops for an item list. You can than record the competitor's prices of these items.

Figure 2-2   Competitor Shop Request

In the table you can maintain a list of competitor shops. The table displays the name, store, store name, shopper, shopper name and shop date.

Create a Competitive Shop List

You can create a competitive shop list in two different ways, either through the Price module or in the Foundation Data module.

To create a competitive shop list in the Foundation Data module, follow the steps below.

1. From the Tasks menu, select **Foundation Data > Items > Manage Item Lists**. The Item List page appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The item lists that match the search criteria are displayed in the Results section.

4. Select a record in the Results table.

5. Then select **Actions > Create > Competitive Shop List**. The Competitor Shop Request page appears.

To create a competitive shop list in the Price module, follow the steps below.

1. From the Tasks menu, select **Price > Competitor Shop Request**. The Competitor Shop Request page appears.

2. In the **Item List** field, enter, select or search for the item list.

> **✎ Note:**
>
> If you have opened the Competitor Shop Request page through the Item List Search, the item list ID and description of the selected item list is displayed.

3. Select **Actions > Add**, or use the Add icon . The Add Competitor Shop Request page appears.

   a. In the **Competitor** field, enter, select or search for the competitor.

   b. In the **Competitor Store** field, enter, select or search for the store.

   c. In the **Shopper** field, enter, select or search for the shopper.

   d. In the **Shop Date** field, enter a shop date or use the Calendar icon to select a date.

   e. Then choose one of the following options.

   • Click **OK** to add the competitor and close the page.

   • Click **OK and Add Another** to add additional competitors.

   • Click **Cancel** to reject all entries and close the page.

3

Manage Coupons

A coupon is a voucher entitling the holder to a discount for a particular product. Merchandising supports the creation and maintenance of coupon configurations which are regularly downloaded to the point of sale (POS) system for processing after they are associated with items, locations, and a timeframe. How the coupon configuration is interpreted depends on the type of POS system used.

Create a Coupon

The Create Coupon option opens the Coupon page. The Coupon page allows you to create, edit, and copy coupon configurations.

You can specify each coupon that can be used at the stores. You can specify the coupon type, the coupon amount, and the tax class for the coupon. You can also select the dates on which the configuration is valid at the stores.

You can associate stores and items with the configuration. You can indicate what items the coupon can be used for by associating items with the configuration. You can only associate stores with the coupons that have the same currency as the configuration. The configuration is then downloaded to the POS registers of the associated stores in a nightly batch process.

When you copy a configuration, the basic configuration information, such as coupon type and amount, is copied into a new configuration and assigned a new ID. However, the associated stores and items are not copied, therefore you must add stores and items to the new configuration.

Figure 3-1   Coupon Page

The header section contains the following fields and icon.

Table 3-1   Header - Fields/Icon and Description

Fields/Icon	Description
Coupon	Displays the number that uniquely identifies the coupon.
	Enter a description for the coupon associated with the coupon number.
Translate icon	You can create a translation by using the Translate icon .

The Coupon Details section contains the following fields and checkboxes.

Table 3-2   Coupon Details - Fields/Checkboxes and Description

Fields/Checkboxes	Description
Total Stores	In the title of the Coupon Details section, the system displays the total number of stores associated with the current coupon configuration.
Items	In the title of the Coupon Details section, the system displays the total number of items associated with the current coupon configuration.
Barcode Type	Select the barcode type from the list.
Barcode	Enter the barcode.
	You can only enter an EAN13 barcode or free text.

Table 3-2   (Cont.) Coupon Details - Fields/Checkboxes and Description

Fields/Checkboxes	Description
Coupon Type	Select the coupon type from the list. This field is a required field.
Value	Enter the value of the coupon.
Currency	Enter, select, or search for the currency of the coupon. This field is a required field.
Maximum Discount Amount	Enter the maximum discount amount value that can be gained from the coupon. This field is a required field.
Maximum Quantity	Enter the maximum quantity for the coupon.
Effective Date	Enter the date on which the coupon is active or use the Calendar icon to select a date.
Expiration Date	Enter the date on which the coupon expires or use the Calendar icon to select a date.
Profit Center	Enter the profit center which specifies that the data is exported to a back office accounting system.
Vendor Type	Select the vendor type from the list.
Vendor	Enter, select or search for the vendor for which the coupon is related to.
Transaction Level checkbox	Select the checkbox to indicate that the coupon is a transaction coupon.
Display checkbox	Select the checkbox to specify that the coupon is displayed in the list of valid coupons on the register.
Prompted checkbox	Select the checkbox to indicate that the cashier is prompted to ask for a coupon.
Export Code	Enter the export code which specifies that the data is exported to a back office accounting system.
Tax Class	Select the tax class from the list.
Created	Displays the user who created the coupon.

You can create a coupon in two different ways.

From the Tasks menu, select **Price > Create Coupon**. The Coupon page appears.

From the Tasks menu, select **Price > Manage Coupons**. In the Results section, select **Actions > Create**. The Coupon page appears.

Then follow the steps below:

1. In the **Coupon** Description field, enter a description for the coupon.

2. In the Coupon Details section, enter, select or search the coupon details, as necessary.

   • You can add stores to the coupon configuration. For more information about this function, see the Adding a Store to a Configuration section.

   • You can add item restrictions to the coupon configuration. For more information about this function, see the Adding an Item section.

3. Then select one of the following options.

   • Click **Save** to save the entered records.

   • Click **Save and Close** to save the entered record and close the page.

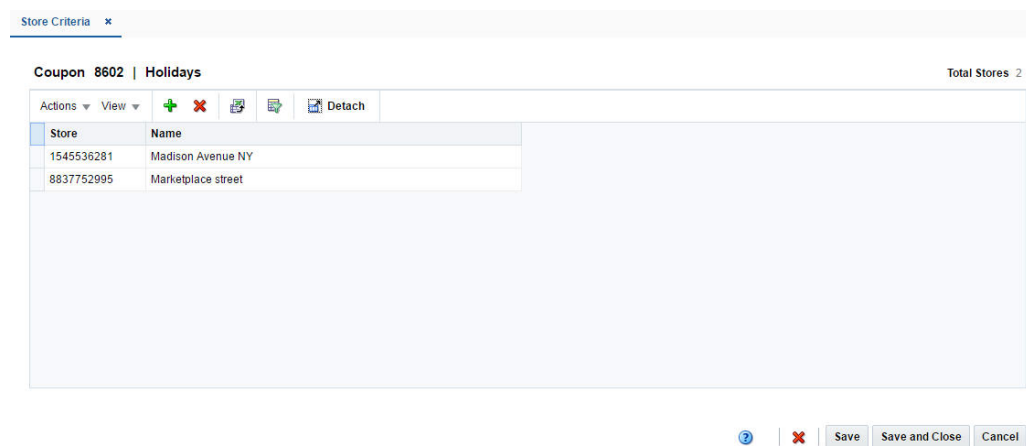   • Click **Cancel** to reject all entries and close the page.

Add Store Criteria

The Store Criteria page allows you to associate stores with the following coupon.

You can add individual stores, or you can add all stores in your organization. You can also associate stores using the following groups:

• Area

• Region

• District

• Location List

Figure 3-2   Store Criteria - Coupon

The configuration ID and description are displayed in the table title. Additionally, the total number of stores already associated with the configuration is displayed in the top right corner.

Adding a Store to a Configuration
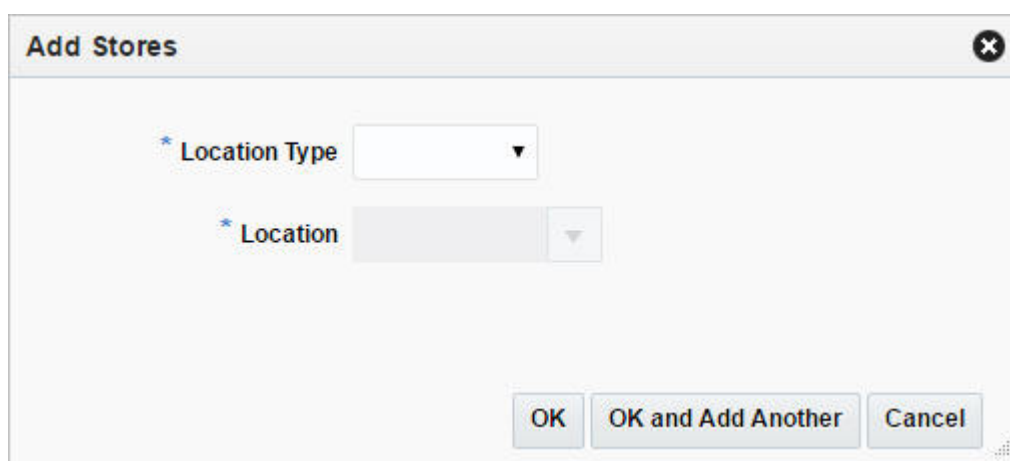
To add a store to the coupon, follow the steps below.

1. In the Coupon Toolbar, select **More Actions > Stores**. The Store Criteria page appears.

2. In the table, select **Actions > Add**, or use the Add icon [+]. The Add Stores page appears.

Figure 3-3   Add Stores Page

a. In the **Location Type** field, select a location type from the list. This field is a required field.

b. In the **Location** field, enter, select or search for the location. This field is a required field.

c. Then choose one of the following options.

    •   Click **OK** to add the location and close the page.

    •   Click **OK and Add Another** to add additional locations.

    •   Click **Cancel** to reject all entries and close the page.

Add Merchandise Criteria

The Merchandise Criteria page allows you to associate items with coupons:

You can associate all the items in a group, department, class, or subclass with the coupon. You can also associate an individual item or all items on an item list with the coupon. After you have associated items with a coupon, you can exclude items. You can either exclude individual items or all items on an item list.

Figure 3-4   Merchandise Criteria Page

The coupon ID and description are displayed in the table title. Additionally, the total number of items already associated with the coupon are displayed in the top right corner.

Adding an Item

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

1. In the table, select **Actions > Add**, or use the Add icon ➕. The Add Criteria page appears.

Figure 3-5   Add Criteria

2. You can add criteria for coupon by individual or by multiple criteria:

    a. Select individual criteria:

Enter, select or search for one of the following criteria in the individual fields:

- **Group**
- **Department**
- **Class**
- **Subclass**
- **Item**
- **Item List**

Then choose one of the following options.

- Click **OK** to add the criteria and close the page.
- Click **OK and Add Another** to add additional criteria.
- Click **Cancel** to reject all entries and close the page.

b. Select multiple criteria:

- Select the Select One or More icon, for the desired field.

  For example, select the Select One or More Department icon, the Select One or More page appears.

Figure 3-6   Select One or More
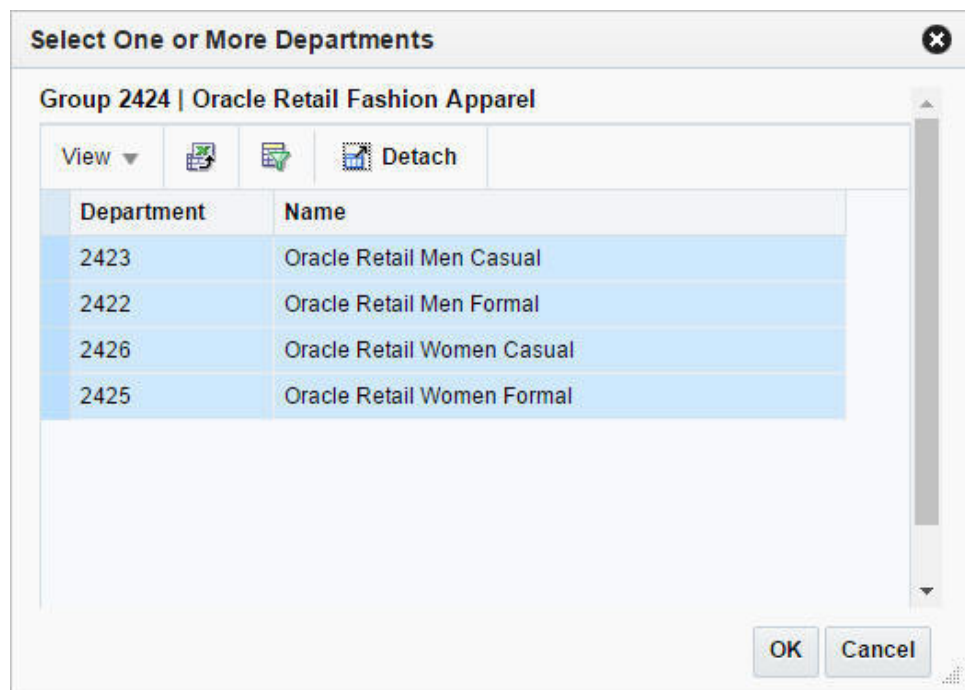
- Select one or more rows in the table to add as criteria and confirm with **OK**. The criteria is added to the table. The page is closed.
- Click **Cancel** to reject all entries and close the page.

Adding an Item Exclusion

After you have entered all criteria for the coupon, you can exclude an individual item, multiple items or all items of an item list. To add an item exclusion, follow the steps below.

1. In the table, select **Actions > Add Exclusion**, or use the **Add Exclusion** button to add an item exclusion. The Add Item Exclusions page appears.

Figure 3-7   Add Item Exclusions

a. To exclude a **single item**:

    In the **Item** field, enter, select or search for an individual item.

b. To exclude **multiple items**:

    Select the Exclude One or More Items icon. The Select One or More page appears.

    -   Select the items you want to exclude from the coupon.

    -   Then click **OK** to exclude the items from the coupon and close the page.

    -   Click **Cancel** to reject all entries and close the page.

c. Exclude all items of an **item list**:

    In the **Item List** field, select an item list.

d. Then choose one of the following options.

    -   Click **OK** to exclude the items and close the page.

    -   Click **OK and Add Another** to add additional items.

    -   Click **Cancel** to reject all entries and close the page.

Update Coupons

The Manage Coupons option opens the Coupon Search page. In this page you can perform the following actions.

- Search for coupons by various search criteria

- View the search results

- View coupon information

- Create coupon information

- Edit coupon information

- You can re-sequence how the coupons appear on the POS register. This allows you to group similar coupons together.

You can access the Coupon Search page from the Task menu, select **Price > Manage Coupons**. The Coupon Search page appears.

Figure 3-8   Coupon Search Page

Search for a Coupon

To search for a coupon:

1. From the Task menu, select **Price > Manage Coupons**. The Coupon Search page appears.

2. You can search for a coupon 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 the basic mode.

Search for a Coupon Through the Basic Search Criteria

To search for a coupon using basic search criteria:

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

Table 3-3   Coupon Search - Basic Search Criteria and Description

Fields	Description
Match option	Check radio button All or Any.
	All - only coupons matching all entered search criteria are shown.
	Any - coupons matching any of the entered search criteria are shown.
Coupon	Enter the coupon ID.
Description	Enter the coupon description.
Effective Date	Enter the effective date or use the Calendar icon to select a date.
Expiration Date	Enter the expiration date or use the Calendar icon to select a date.
Store	Enter, select or search for the store associated to the coupon.
Department	Enter, select or search for the department associated to the coupon.
Class	Enter, select or search for the class associated to the coupon.
Subclass	Enter, select or search for the subclass associated to the coupon.
Item	Enter, select or search for the item associated to the coupon.

2. Click **Search**. The coupons 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.

The Results section lists the retrieved coupons.

Search for a Coupon Through Advanced Search Criteria

To search for a coupon 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 coupons that match the search criteria are displayed in the Results section.
4. Click **Reset** to clear the search section and results.

ORACLE®

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 page 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 page.

   • Click **Cancel** to reject any changes and close the page.

7. Click **Done** to close the page.

The Results section lists the retrieved coupons.

Create a Coupon from an Existing Coupon

When you copy a coupon, the basic coupon information, such as coupon type, are copied into a new coupon and assigned a new ID. However, the associated stores and items are not copied, you must add stores and items to the new coupon.

To create a coupon from an already existing one, follow the steps below.

1. From the Tasks menu, select **Price > Manage Coupons**. The Coupon Search page appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The coupons that match the search criteria are displayed in the Results section.

4. Select a record in the table.

5. Then select **Actions > Create from Existing**, or use the Create from Existing icon . The Coupon page appears. All data from the selected coupon is displayed.

6. In the Coupon Details section, change the coupon details, as necessary. For more information about the Coupon section, see the Create a Coupon section.

   • You can add stores to the coupon. For more information about this function, see the Adding a Store to a Configuration section.

   • You can add items to the coupon. For more information about this function, see the Adding an Item section.

7. Then select one of the following options.

   • Click **Save** to save the entered records.

   • Click **Save and Close** to save the entered record and close the page.

   • Click **Cancel** to reject all entries and close the page.

Editing a Coupon

To edit a coupon, follow the steps below.

1. From the Tasks menu, select **Price > Manage Coupons**. The Coupon Search page appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The coupons that match the search criteria are displayed in the Results section.

4. In the coupon column, click the coupon link, or mark a record and select **Actions > Edit**, or use the Edit icon   . The Coupon page appears. The data of the selected coupon is displayed.

5. In the Coupon Details section, change the coupon details, as necessary. For more information, see the Create a Coupon section.

   • You can add or remove stores from the coupon. For more information about this function, see the Adding a Store to a Configuration section.

   • You can add or remove items to the coupon. For more information about this function, see the Adding an Item section.

6. Then select one of the following options.

   • Click **Save** to save the entered records.

   • Click **Save and Close** to save the entered record and close the page.

   • Click **Cancel** to reject all entries and close the page.

Coupon Resequence

In the Coupon Resequence page you can change the sequence of how the coupons are displayed on the POS register.

Figure 3-9   Coupon Resequence Page

The table displays the available coupons with the current sequence.

Resequencing the Coupon Order

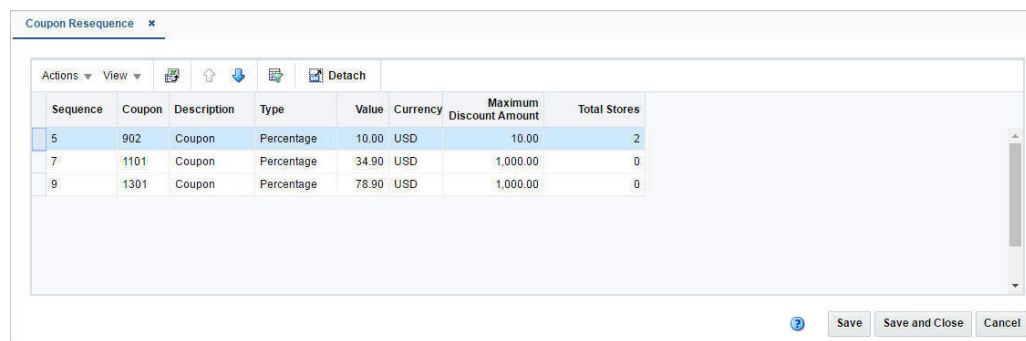To change the sequence of how the coupons are displayed, follow the steps below.

1. From the Tasks menu, select **Price > Manage Coupons**. The Coupon Search page appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The coupons that match the search criteria are displayed in the Results section.

4. Select a record in the table.

5. Then select **Actions > Resequence Coupons**. The Coupon Resequence page appears.

6. Select **Actions > Move Up/Move Down**, or use the corresponding icons to rearrange the order of the coupons.

7. Then select one of the following options.

    • Click **Save** to save the changed order.

    • Click **Save and Close** to save the changed order and close the page.

    • Click **Cancel** to reject all entries and close the page.

4

Manage Customer Segments

Customer segments are groups of customers divided based on common characteristics in order to market to each group effectively and appropriately. Customer segment types and customer segments can be defined in Merchandising; however it is used for reporting purposes only.

Customer segment types and customer segments are maintained through the download/upload process. This functionality is accessed from the main Merchandising task list under Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data.

To add, update, or remove customer segment information, select the template type of Price and Cost from the Download Data screen and then the Customer Segment template. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice.

Add a Customer Segment

To add a new customer segment, start in the Customer Segment Types tab, and, in a blank line in the template, select the action type of Create. Next enter a unique segment type identifier (up to 6 characters) and the description for the customer segment type in the primary language (as defined in the Merchandising system options) of up to 120 characters. Optionally, you can also enter the address, phone, fax, website or jurisdiction of the competitor in the subsequent columns.

Next, if you wish to add translations for the customer segment type in languages other than the primary language, this can be done in the Customer Segment Type Trans tab. Navigate to a blank row and select the action type of Create and the language in which the translated description will be entered. Then, enter the customer segment type for which the translation applies. Finally, enter the translated description. The translated description can also be up to 120 characters long. This is an optional step.

Next, the customer segments that belong in this customer segment type can be added. To do this, move to the Customer Segments tab in the spreadsheet. Again, navigate to a blank row in the sheet and select an action type of Create. Enter the first segment (up to 10 digits), and the segment's description. The segment description should be in the primary language (as defined in the Merchandising system options) and can be up to 120 characters. Then enter the segment type to which the segment is being added.

Lastly, if you wish to add translations for the customer segment in languages other than the primary language, this can be done in the Customer Segment Translations tab. Navigate to a blank row and select the action type of Create and the language in which the translated description will be entered. Then, enter the customer segment for which the translation applies. Finally, enter the translated description. The translated description can also be up to 120 characters long. This is an optional step.

Update a Customer Segment

If you would like to update any customer segment descriptions or translations, a similar process will be followed as that described above for creating new customer segments. First,

download the spreadsheet, and then navigate to the tab where you would like to make your updates.

The following columns can be updated in each tab:

- Customer Segment Types - Customer Segment Type Description
- Customer Segment Type Trans - Customer Segment Type Description
- Customer Segments - Customer Segment Description
- Customer Segment Translations - Customer Segment Description

In the tab where you are going to make your updates, select the action type of Update, and then correct the value in the spreadsheet.

Deleting a Customer Segment

If you wish to delete a customer segment type, update the action column to select Delete in each of the tabs where it occurs. Customer segments can be deleted in a similar manner.

Uploading 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, select the template type Price and Cost and the template Customer Segments. This will generate a process description automatically, but this can be updated if desired. Lastly, 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.

See also Download/Upload Data from Spreadsheets and View Data Loading Status.