

# Oracle® Retail Merchandising Foundation Cloud Service Recent Orders Mobile User Guide



Release 23.0.101.0

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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.

ORACLE®

Oracle Retail Merchandising Foundation Cloud Service Recent Orders Mobile User Guide, Release 23.0.101.0

F76950-02

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Primary Author: Ken Ramoska

Contributing Authors:

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Oracle® Retail Merchandising Foundation Cloud Service Recent Orders Mobile User Guide, Release 23.0.101.0

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- 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?

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# Preface

This document describes the Oracle Retail Merchandising Mobile User Interface. It provides step-by-step instructions to complete most tasks that are performed using the user interface.

## Audience

This document is for users and administrators of Oracle Retail Merchandising such as buyers, inventory analysts and managers, and administrative personnel.

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## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	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

## Overview

This guide describes the methods by which you review recent purchase orders from Merchandising. You can approve or reject one or multiple orders that are in worksheet and submitted status.

The following topics are discussed in this chapter:

- [Getting Started](#)
- [Recent Orders](#)
- [Order Summary Screen](#)
- [Order Details](#)
- [Order Actions: Order Summary and Order Detail Screens](#)

# 2

## Getting Started

Merchandising has a mobile workflow for purchase orders. The Recent Orders workflow contains the following screens:

- Recent Orders
- Filter Criteria
- Order Summary
- Order Details

### URL Path

To access the Merchandising Mobile workflows: <https://<hostname>/MerchMobile/>. Place this URL in a web browser and use the same login credentials used to log into the Merchandising desktop applications.

### Security

Access to each of the Merchandising mobile workflows and actions within are controlled by the same privileges which grant access to the same functional areas in the desktop applications. For example, a user with the ability to create, view, modify and approve purchase orders in the desktop application, will be able to perform those same actions in the Recent Orders mobile workflow.

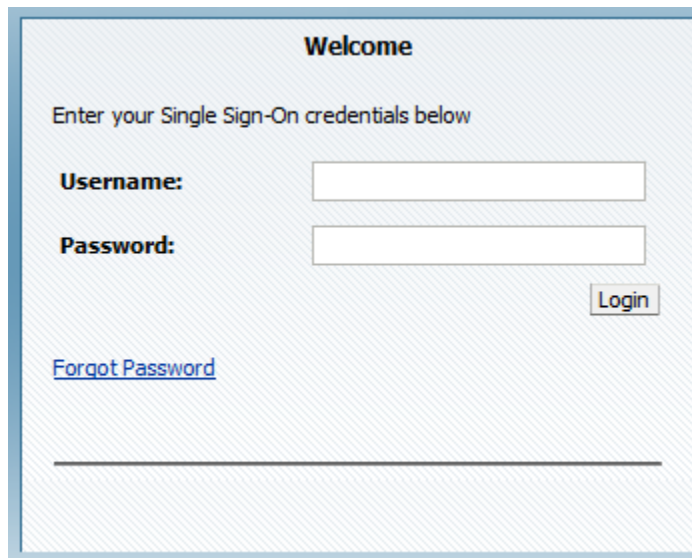
For more details on security privileges and the access granted by each, refer to the *Oracle Retail Merchandising Security Guide*.

### Accessing the Recent Orders Workflow

When accessing the Recent Orders workflow for the first time, you will see a screen displayed indicating the need to set your default search criteria before Purchase Orders can be viewed. To access Recent Orders:

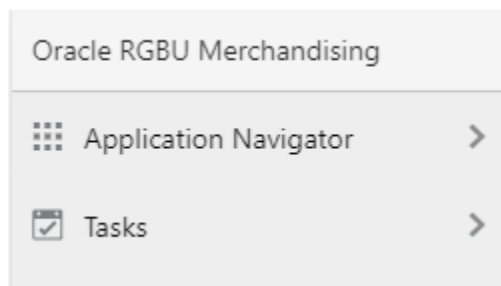
1. Login to the application.

**Figure 2-1 Welcome Screen**



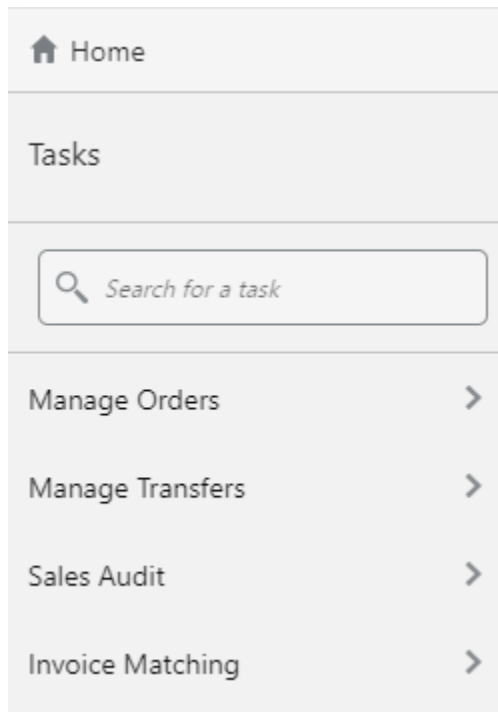
2. Tap the Menu icon. The Merchandising options appear.

**Figure 2-2 Merchandising Options**



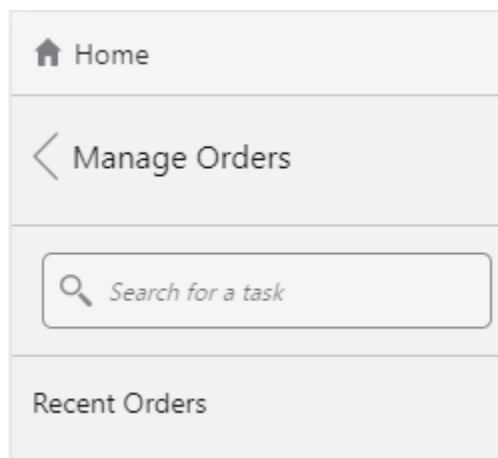
3. Tap Tasks. The Tasks options appear.

**Figure 2-3 Tasks**



4. Tap Manage Orders. The Recent Orders task appears.

**Figure 2-4 Recent Orders**



5. Tap Recent Orders. The Recent Orders screen appears.

Figure 2-5 Recent Orders Screen

The screenshot shows the Oracle interface for 'Recent Orders'. At the top, there is a search bar with the text 'Search by Order No.' and icons for search, filter, and help. Below the search bar is a list of six order items. Each item includes a status icon (checkmark or calendar), a name, an order number, a status, two dates, and a monetary value.

Status	Name	Order No.	Status	Date 1	Date 2	Amount
✓	- Charlotte	2495002	Approved	12/16/19	12/17/19	200.00 USD
📅	- Charlotte	2445002	Worksheet	11/14/19	11/14/19	13,547.00 USD
📅	- Charlotte	2445004	Worksheet	11/14/19	11/14/19	0.00 USD
✓	- Charlotte	2450002	Approved	11/13/19	11/13/19	20,000.00 USD
📅	- Charlotte	2455003	Worksheet	11/19/19	11/20/19	USD
📅	- Charlotte	2465002	Worksheet	11/22/19	11/30/19	USD

# 3

## Recent Orders

### Recent Orders Screen

The Recent Orders screen shows the list of orders based on the criteria selected. Actions include tapping an order in the list, which allows you to quickly select approve, reject, share, or update dates.

Figure 3-1 Recent Orders

The screenshot shows the Oracle 'Recent Orders' interface. At the top, there is a search bar labeled 'Search by Order No.' with a magnifying glass icon, a dropdown arrow, and a help icon. Below the search bar, a list of orders is displayed. Each order entry includes a status icon (checkmark or calendar), a supplier site name (blurred), an order number, a status (e.g., 'Approved' or 'Worksheet'), a start date, an end date, and a total amount in USD.

Status	Supplier Site	Order Number	Status	Start Date	End Date	Amount (USD)
Approved	[Blurred]	2495002	Approved	12/16/19	12/17/19	200.00
Worksheet	[Blurred]	2445002	Worksheet	11/14/19	11/14/19	13,547.00
Worksheet	[Blurred]	2445004	Worksheet	11/14/19	11/14/19	0.00
Approved	[Blurred]	2450002	Approved	11/13/19	11/13/19	20,000.00
Worksheet	[Blurred]	2455003	Worksheet	11/19/19	11/20/19	USD
Worksheet	[Blurred]	2465002	Worksheet	11/22/19	11/30/19	USD

Field	Description
Supplier Site	Displayed at the top of each order in bold
Order Number	Displays the numeric identifier for the purchase order.

Field	Description
Status	The description of the status of the order: <ul style="list-style-type: none"> <li>• Worksheet (GRAY)</li> <li>• Submitted (GRAY)</li> <li>• Approved (GREEN)</li> <li>• Closed (GRAY)</li> </ul>
Not Before Date	Not Before Date of the purchase order
Not After Date	Not After Date of the purchase order
Total Cost	The total cost of the order in order currency Example: 10,000.00 USD

**Note:**

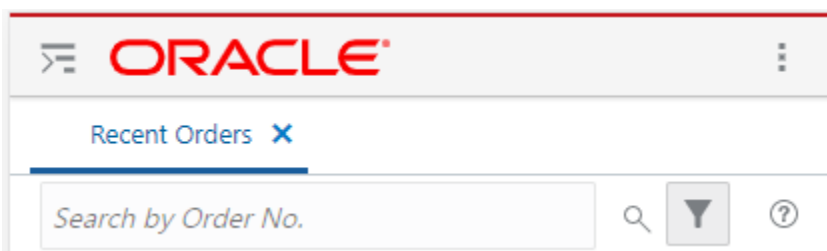
Availability of action will be based on the status of the orders selected.

## Filter Criteria

The Criteria screen sets and refines default search criteria. Each time the user logs into the Recent Orders mobile workflow, it renders their "Recent Orders" search list against the criteria saved here. To access the Filter Criteria screen:

1. Login to the application. See [Accessing the Recent Orders Workflow](#) for details.
2. Tap the Menu icon. The Merchandising options appear.
3. Tap Tasks. The Tasks options appear.
4. Tap Manage Orders. The Recent Orders task appears.
5. Tap Recent Orders. The Recent Orders screen appears.

**Figure 3-2 Recent Orders Screen**



6. Tap the Filter icon. The Filter Criteria screen appears.



**Figure 3-3** Recent Orders Filter Criteria Screen

Filter Criteria

Status  
Any Status

Created By  
All Users

Created Date  
All Dates

Supplier Site  
All Sites

Origin  
Any Origin

Departments  
All Departments

Reset | Cancel | Apply

Field	Description
Status	Limits the orders returned by an order's current status. You can select any status or a single status for which to return results. Valid values include: Any Status (Default), Worksheet, Submitted, Approved, and Closed. <b>Note:</b> Any Status is the default. It only returns the statuses listed above.
Created By	Limits the returned orders by a User ID. You can select one or more User IDs to be applied to the criteria from a list. This is defaulted to "All Users" the first time you enter this screen. If one User ID is selected, then the User ID is displayed. If multiple User IDs are selected, then this reads "Multiple Users".
Created Date	Limits the returned orders based on the create date for the Purchase Order. Valid values include: Today, Last 2 days, Last 7 days, Last 30 days, and All Dates (Default).
Supplier Site	Limits the returned orders to a specific supplier site. You can select one or more supplier sites to be applied to the criteria from a list. This is defaulted to "All Supplier Sites" when you access this screen for the first time. If one supplier site is selected, then the supplier site's ID is displayed. If multiple supplier sites are selected, then this reads "Multiple Supplier Sites". All active supplier sites are able to be selected, however if you are assigned to a specific organizational unit in Merchandising, then only those suppliers associated with the organizational unit associated with the user are able to be selected.
Origin	Limits the returned orders based on how they originated. Only one value can be selected to limit the criteria. Valid values include: Any Origin (Default), Current System Generated, Past System Generated, Manual, Buyer Worksheet, Consignment Sales Generated PO, Vendor Generated, AIP Generated PO, SIM Generated PO, Allocation Generated PO, Consignment Transfer Generated PO, and Consignment Ownership Generated PO.
Department	Limits the returned orders to only those that have corresponding items in the specified departments. If one department is selected, then the department's ID is displayed. If multiple departments are selected, then this reads "Multiple Departments". All departments are able to be selected, however it is limited based on any data level security for the user set in Merchandising.

The following three actions are available in the Filter Criteria screen:

- Tap **Cancel** to return to the Recent Orders screen without applying any new criteria selections.
- Tap **Reset** to reset the search criteria to the initial first time settings.
- Tap **Apply** to execute the search based on the choices made during criteria selection.

The following criteria has the ability to search for specific information and selects one or more values:

- Created By
- Supplier Site
- Departments

Tap on the following to access the search capabilities for the choices above:

- All Users
- All Supplier Sites
- All Departments

 **Note:**

It may not be these values always. If you had previously selected one or more values then it will not show as 'All Users' but either the specific user or multiple users for example.

Add Users is outlined here. The other choices use a similar process:

1. Tap the Created By criteria: All Users X icon to delete the criteria.
2. Tap anywhere in the Search by User box. A list of users and a keyboard appears.

Figure 3-4 Created by Search

The screenshot shows a 'Filter Criteria' dialog box with a close button (X) in the top right corner. It contains three main sections: 'Status' with a dropdown menu set to 'Any Status'; 'Created By' with a search input field containing a vertical bar and a list of users including 'All Users', 'RMS01', 'RMS01APP', 'RMS01\_USER1', 'RMS01\_USER2', 'RMS01\_USER3', and 'RMS01\_USER4'; and 'Departments' with a dropdown menu set to 'All Departments'. A keyboard overlay is visible at the bottom, and at the very bottom of the dialog are 'Reset', 'Cancel', and 'Apply' buttons.

3. Enter all or part of a user name. As you type, the list of names dynamically change.
4. Tap on the desired name.
5. Repeat Steps 3 and 4 to add more names. Any users selected based on the previously entered criteria remain in the list.
6. To delete a user, tap on the X icon next to each name in the list.

**Figure 3-5 Created By Criteria**

Created By

RMS01 × RMS\_

RMS\_ADMIN

rms\_admin

All Dates

7. Tap **Apply**. The recent orders for the selected users appear in the list.

 **Note:**

The Department and Supplier Site search also follows a similar workflow.

Figure 3-6 Recent Orders Screen

The screenshot shows the Oracle 'Recent Orders' screen. At the top, there is a search bar labeled 'Search by Order No.' with a magnifying glass icon, a dropdown arrow, and a help icon. Below the search bar is a list of six order entries. Each entry includes a status icon (checkmark or calendar), a name (blurred), the order number, the status, and two dates. The first entry is highlighted in light blue.

Status	Name	Order No.	Status	Date 1	Date 2	Amount
✓	[blurred]	2495002	Approved	12/16/19	12/17/19	200.00 USD
Calendar	[blurred]	2445002	Worksheet	11/14/19	11/14/19	13,547.00 USD
Calendar	[blurred]	2445004	Worksheet	11/14/19	11/14/19	0.00 USD
✓	[blurred]	2450002	Approved	11/13/19	11/13/19	20,000.00 USD
Calendar	[blurred]	2455003	Worksheet	11/19/19	11/20/19	USD
Calendar	[blurred]	2465002	Worksheet	11/22/19	11/30/19	USD

## Searching for Order Numbers

Search by Order Number: Enter all or part of an Order Number in the Search by Order No. field. The order numbers dynamically update as you type in the value.

Figure 3-7 Recent Orders: Search by Order Number

The screenshot shows the Oracle interface for searching recent orders. At the top, there is a search bar containing the number '216'. Below the search bar, a list of order entries is displayed. Each entry includes a supplier name, order number, status, and dates. The status 'Approved' is highlighted in green. The interface also features a grid icon, a magnifying glass, a funnel icon, and a question mark icon.

Supplier	Order Number	Status	Start Date	End Date	Amount
General Book Supplier	2165009				
Worksheet					
USD					
Local Grocery Supplier #1	2165010	Approved	9/24/19	9/25/19	500.00 USD
Local Grocery Supplier #1	2165015	Approved	9/25/19	9/25/19	1,000.00 USD
Coca Cola - Charlotte	2165016	Approved	9/24/19	9/24/19	0.00 USD
General Book Supplier	2165017				
Worksheet					
USD					
Coca Cola - Charlotte	2160004	Approved	9/10/19	9/23/19	20.00 USD

# 4

## Order Summary Screen

The Order Summary screen displays a summary of the purchase order information, for the order selected on the Recent Orders page. To access the Order Summary screen:

1. Tap on any order in the Recent Orders screen. The Order Summary screen appears.



Figure 4-1 Order Summary Screen

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⋮

Recent Orders ×
910011 ×

Supplier Site Name ?

✓
Approved

Total Cost

1,416.00

MXN

Total Retail

1,716.00

MXN

**Not Before**

11/25/20

**Not After**

11/25/20

**OTB EOW**

11/28/20

---

**Terms**

2 - 01 003.40% 030 040

**Created By**

RMS01

⚠ One or more subclasses have exceeded their open to buy.

<
1 of 2
>

1616 | 1717 | 1818 - Cotton Pants

**OTB Budget** 5,000.00 MXN

<span style="color: green;">■</span>	Received	984.020 MXN
<span style="color: blue;">■</span>	Outstanding	-984.020 MXN
<span style="color: lightblue;">—</span>	Open	432.00 MXN

---

**Items**

**MX-GTS-Red Wine**

108652705 **Quantity 18**

---

**MX-GTS-Green Pants**

108752693 **Quantity 100**

Share

Area	Description
Header	<p>Displays the following information pertaining to the selected record:</p> <ul style="list-style-type: none"> <li>• Supplier Site Name</li> <li>• Status</li> </ul>
Order Details	<ul style="list-style-type: none"> <li>• Total Cost - Represents the total cost of the order in the order's currency. It is calculated as the sum of the order quantity times the order cost for each item location on the order.</li> <li>• Total Retail - Represents the total retail value of the order in the order's currency. It is calculated as the sum of the order quantity times the unit retail price for each item location on the order.</li> <li>• Dates - The following choices are available: <ul style="list-style-type: none"> <li>– Not Before - Represents the start of the shipping window for a purchase order.</li> <li>– Not After - Represents the end of the shipping window for a purchase order.</li> <li>– OTB EOW - Represents the OTB End of Week date for a purchase order. <b>Note:</b> Only displays if OTB is enabled in the Merchandising application by setting the OTB system option to Yes.</li> </ul> </li> <li>• Terms - The ID and description of the payment terms for the order.</li> <li>• Created By - Represents the User ID of the person who created the purchase order.</li> </ul>
OTB Details (Only displays if OTB is enabled in the Merchandising application by setting the OTB system option to Yes.)	<p>Displays the OTB details for the order, by subclass. This section allows you to tap on the "Next &gt;" and "&lt; Prev" links to see each subclass represented on the order to view the impact on that subclass's OTB). For each subclass the following is displayed.</p> <ul style="list-style-type: none"> <li>• Department, Class, and Subclass combinations for the order followed by the subclass name.</li> <li>• The total OTB budget for the subclass in the end of week date for the Purchase Order. The Purchase Order and order type are shown in the order currency.</li> <li>• The OTB graph presents the total value of received and approved orders for the subclass, order type, and OTB EOW day shown. The order cost is represented separately for unapproved orders. The red line in the graph represents the budget amount to show you visually whether you are over or under your OTB budget. The following fields have icons to represent their corresponding values in the graph: <ul style="list-style-type: none"> <li>– <b>Received</b> - Received amount on the OTB table for subclass, OTB EOW date, and order type.</li> <li>– <b>Outstanding</b> - Approved amount on the OTB table, less received amount, for the subclass, OTB EOW date, and order type.</li> <li>– <b>Open</b> - Indicates the open budget in this subclass for purchases calculated as Budget minus Received minus Outstanding.</li> </ul> </li> <li>• Warning Symbol and Message - If the open to buy budget for one or more subclasses represented on the order has been exceeded, a warning symbol and message displays at the bottom of this area. The message will read "One or more subclasses on the order have exceeded their Open to Buy."</li> </ul>
Items	<p>Displays the following information for each item on the purchase order:</p> <ul style="list-style-type: none"> <li>• Item Description</li> <li>• Item Number</li> <li>• Quantity - shows the quantity ordered for the item</li> </ul>

Area	Description
Available Actions	<p>You will have one or more actions available to perform on the order, based on your user privileges and order status. Available actions include:</p> <ul style="list-style-type: none"> <li>• Approve</li> <li>• Reject</li> <li>• Cancel Order</li> <li>• Update Dates</li> <li>• Share</li> </ul>

Order Status	User Privilege	Available Actions
Worksheet	View Orders	Share
Worksheet	Maintain Orders	Update Dates, Cancel Order (only if order was previously approved), Share
Worksheet	Approve Orders	Approve, Update Dates, Cancel Order (only if order was previously approved), Share
Submitted	View Orders	Share
Submitted	Maintain Orders	Reject, Update Dates, Cancel Order (only if order was previously approved), Share
Submitted	Approve Orders	Approve, Reject, Update Dates, Cancel Order (only if order was previously approved), Share
Approved	View Orders	Share
Approved	Maintain Orders	Update Dates, Cancel Order (only if order was previously approved), Share
Approved	Approve Orders	Update Dates, Cancel Order (only if order was previously approved), Share
Closed	View Orders	Share
Closed	Maintain Orders	Share
Closed	Approve Orders	Share

# 5

## Order Details

The Order Detail screen displays the item detail based on your selection from the Order Summary screen. To access the order details for an item, tap on any item in the Items area. The Order Detail screen appears.


Figure 5-1 Order Detail Screen

☰
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⋮

Recent Orders ✕
2445002 ✕
2445002 Detail ✕

Items
?

<
3 of 5
>



**Mens Classic Cut Polo Shirt:PINK:M**

Fashion Supplies

**Parent Item**

Mens Classic Cut Polo Shirt - 103850024

**Differentiators**

**Color**  
Pink Rose - PINK

**Size**  
Medium - M

**Total Cost**  
5,998.50 USD

**Total Quantity**  
150

Location	Total Cost	Ordered Quantity
Charlotte	2,999.25 USD	75
Chicago	2,999.25 USD	75

Share

Approve

Area	Description
Header	<p>The header includes the following:</p> <ul style="list-style-type: none"> <li>• Items Title</li> <li>• Help Icon</li> <li>• Previous and Next buttons with a count showing which item of the total number of items the user is viewing.</li> </ul> <p>You can scroll through the items in the order. An indication of the total number of items on the order and which item you are viewing is displayed, using the Next or Previous button to scroll through the items on the order. Moving between items on the order refreshes all item related data on this page.</p>
Item Details	<ul style="list-style-type: none"> <li>• Item Image - Primary image for the item is displayed</li> <li>• Item Description - Description of the item.</li> <li>• Supplier Site Name - Name of the primary supplier site of the item.</li> <li>• Parent Item Description - Description of the item parent. Only displays if the item being viewed is a child item.</li> <li>• Parent Item Number - ID for the item parent. Only displays if the item being viewed is a child item.</li> </ul>
Differentiators	<p>This area shows the differentiator description and identifier for each differentiator associated with the item being viewed. If the item being viewed doesn't have differentiators, this section will be hidden.</p> <ul style="list-style-type: none"> <li>• Total Cost - Represents the total cost of the item on the order in the order currency.</li> <li>• Total Quantity - Indicates the order quantity for the item across all locations on the order.</li> </ul>
Locations	<p>The location area shows the total locations on the order for the item at the top. The data for the location is shown at the item level indicated at the top of the page (item, item parent, or item parent/diff). For each location, the following information is displayed:</p> <ul style="list-style-type: none"> <li>• Location - Shows the location name and ID.</li> <li>• Total Cost - Shows the total cost of the item at the location on the order.</li> <li>• Ordered Quantity - Shows the total quantity ordered for the item at this location.</li> </ul>
Available Actions	<p>You will have one or more actions available to perform on the order, based on your user privileges. Available actions include:</p> <ul style="list-style-type: none"> <li>• Approve</li> <li>• Reject</li> <li>• Cancel Order</li> <li>• Update Dates</li> <li>• Share</li> </ul>

# 6

## Order Actions: Order Summary and Order Detail Screens

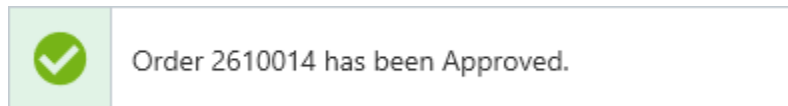
You will have one or more actions available to perform on the order, based on your user privileges and order status. Available actions include:

- Approve
- Reject
- Cancel Order
- Update Dates
- Share

### Approve an Order

1. To approve an order, tap **Approve**. A notification appears confirming the approval.

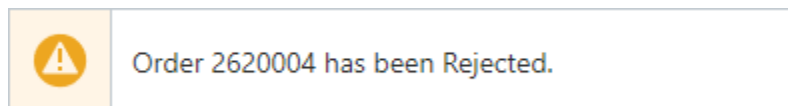
**Figure 6-1 Approval Notification**



### Reject an Order

1. To reject an order, tap **Reject**. A notification appears confirming the rejection.

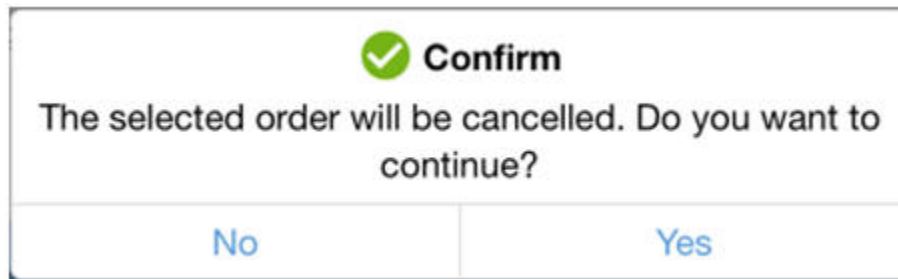
**Figure 6-2 Confirm Reject Pop-up Window**



### Cancel an Order

1. To cancel an order, tap **Cancel Order**.
2. Tap the reason for the cancellation.
3. Tap **OK**. A notification appears confirming the cancellation.

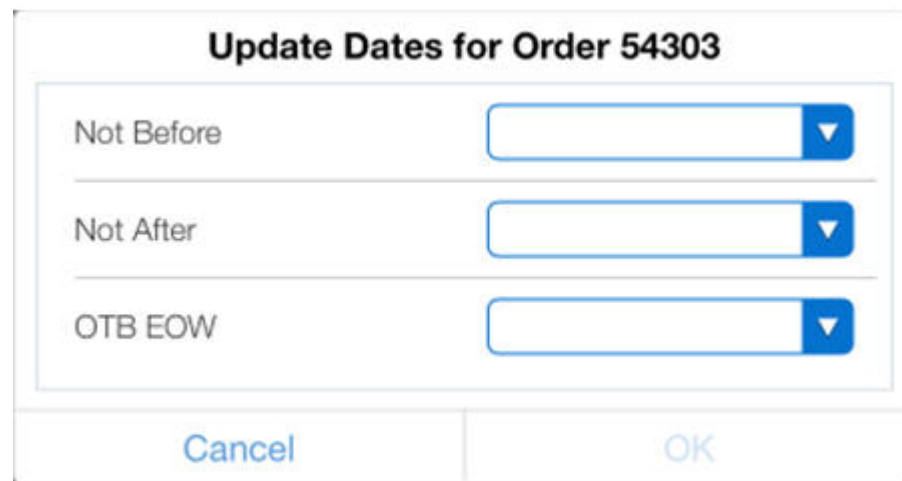
Figure 6-3 Confirm Cancel Pop-Up Window



## Update Dates

1. To Update Dates, tap the Update Dates button. A pop up window appears.
2. The following dates can be edited:
  - Not Before
  - Not After
  - OTB EOW

Figure 6-4 Update Dates Window



3. Tap the arrow corresponding to the date you want to change.
4. Tap and scroll to select the new Month, Day, and Year.



Figure 6-5 Update Dates Selection Window

The screenshot shows a mobile application interface for updating dates. At the top right, there is a 'Clear' button. Below it is a calendar grid with months and years. The selected date is 'Sep 14, 2016'. Below the calendar, there is a section titled 'Update' with three dropdown menus: 'Not Before' (set to 'Sep 14, 2016'), 'Not After', and 'OTB EOW'. At the bottom, there are 'Cancel' and 'OK' buttons.

Month	Day	Year
June	11	2013
July	12	2014
August	13	2015
<b>September</b>	<b>14</b>	<b>2016</b>
October	15	2017
November	16	2018
December	17	2019

**Update**

Not Before: Sep 14, 2016

Not After: [Dropdown]

OTB EOW: [Dropdown]

Buttons: Cancel, OK

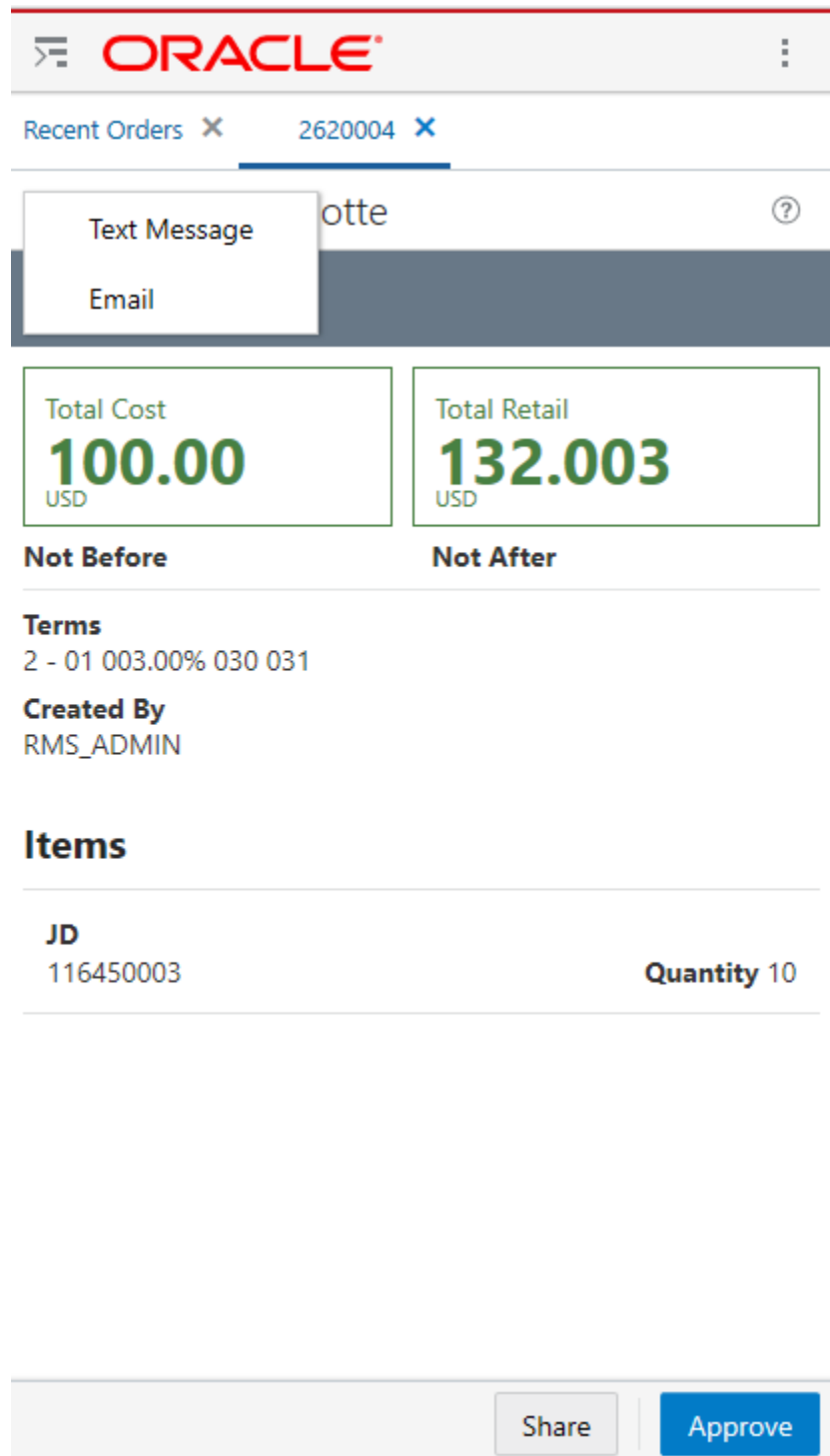
5. Tap anywhere on the screen to accept the new dates. Tapping **Cancel** discards any changes.
6. Tap **OK**. The Confirm pop up window appears.
7. Tap **Yes**. A pop up appears confirming the dates are updated.
8. Tap **OK**. The new dates appear in the corresponding fields for that order.

## Share an Order

The Share button located in the bottom toolbar will enable you to send a summarized view of the orders on this page via SMS or e-mail to a contact. This will allow you to clarify information about the Purchase Order or provide an explanation for why it cannot be approved in its current state. To share a Purchase Order:

1. Tap the Share button in the Order Summary or Order Details screen.

Figure 6-6 Order Details Screen Share Button



2. Tap either Text Message or the Email.

**Text Message**

3. For Text Message, enter the mobile number in the To: box and any message in the section below it.

Figure 6-7 New Message Window

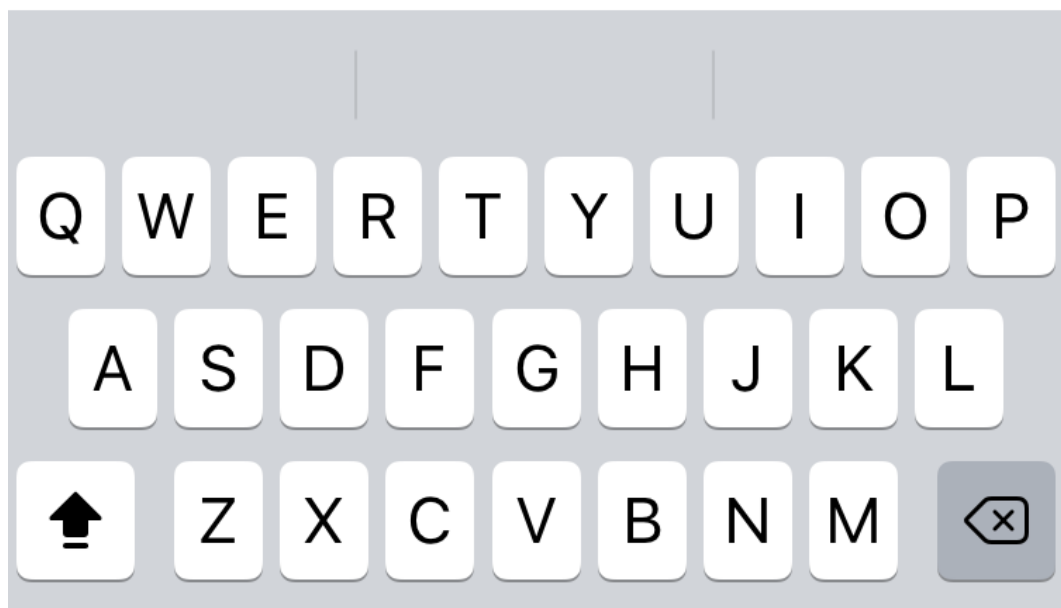
**New Message** Cancel

---

To:

> ↑

Order - 2120004  
Fashion Supplier  
Submitted  
Order Dates 6/29/20 - 9/29/20  
Total Order Cost 30,000.00  
USD



4. Tap **Send**.

**Email**

5. For email, follow the on screen prompt to navigate to your business's email application, then enter the email address and finish the process using your default email application.