Oracle® Retail Merchandising Foundation Cloud Service

Recent Orders Mobile User Guide

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

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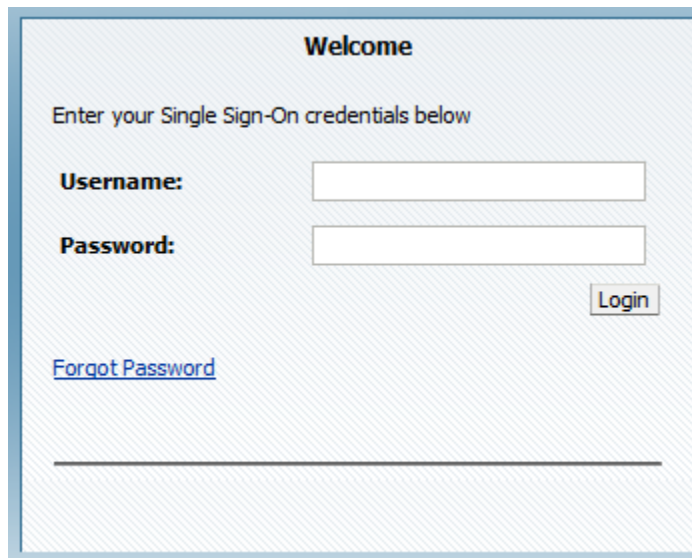
2. Tap the Menu icon. The Merchandising options appear.

Figure 2-2   Merchandising Options
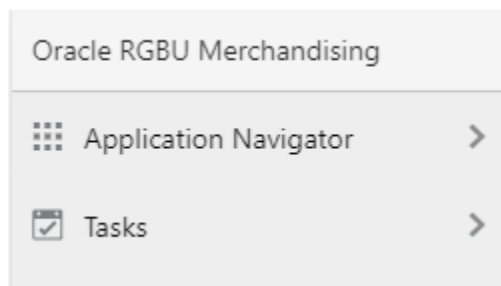
3. Tap Tasks. The Tasks options appear.

Figure 2-3   Tasks
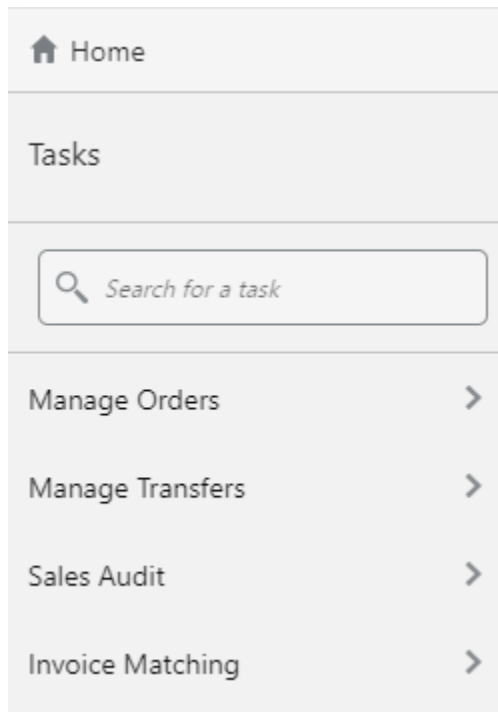
4. Tap Manage Orders. The Recent Orders task appears.

Figure 2-4   Recent Orders
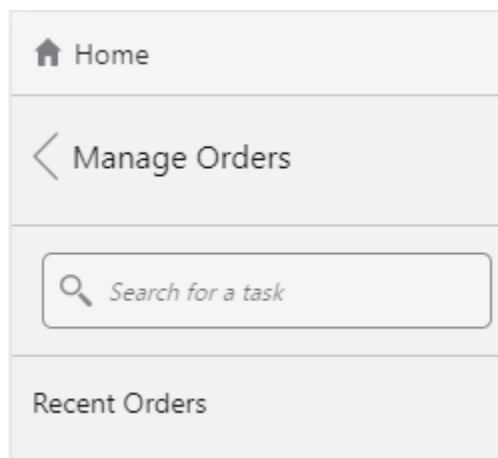
5. Tap Recent Orders. The Recent Orders screen appears.

Figure 2-5   Recent Orders Screen

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

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: • Worksheet (GRAY) • Submitted (GRAY) • Approved (GREEN) • Closed (GRAY)
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
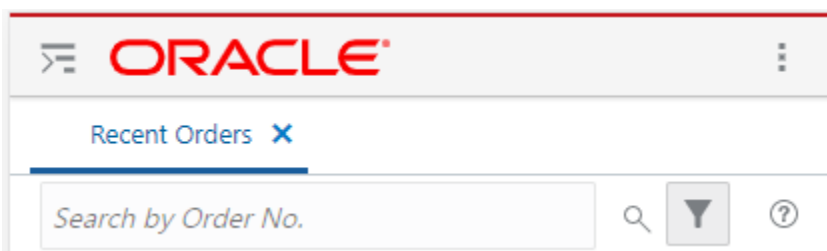
6. Tap the Filter icon. The Filter Criteria screen appears.

Figure 3-3   Recent Orders Filter Criteria Screen

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.
	Note: 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

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

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

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

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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

Area	Description
Header	Displays the following information pertaining to the selected record: • Supplier Site Name • Status

Order Details	• 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.
	• 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.
	• Dates - The following choices are available:
	  – Not Before - Represents the start of the shipping window for a purchase order.
	  – Not After - Represents the end of the shipping window for a purchase order.
	  – OTB EOW - Represents the OTB End of Week date for a purchase order. **Note:** Only displays if OTB is enabled in the Merchandising application by setting the OTB system option to Yes.
	• Terms - The ID and description of the payment terms for the order.
	• Created By - Represents the User ID of the person who created the purchase order.

OTB Details (Only displays if OTB is enabled in the Merchandising application by setting the OTB system option to Yes.)	Displays the OTB details for the order, by subclass. This section allows you to tap on the "Next >" and "< 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.
	
	• Department, Class, and Subclass combinations for the order followed by the subclass name.
	• 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.
	• 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:
	  – **Received** - Received amount on the OTB table for subclass, OTB EOW date, and order type.
	  – **Outstanding** - Approved amount on the OTB table, less received amount, for the subclass, OTB EOW date, and order type.
	  – **Open** - Indicates the open budget in this subclass for purchases calculated as Budget minus Received minus Outstanding.
	• 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."

Items	Displays the following information for each item on the purchase order: • Item Description • Item Number • Quantity - shows the quantity ordered for the item

Area	Description
Available Actions	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

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

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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

Area	Description
Header	The header includes the following: • Items Title • Help Icon • Previous and Next buttons with a count showing which item of the total number of items the user is viewing. 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.
Item Details	• Item Image - Primary image for the item is displayed • Item Description - Description of the item. • Supplier Site Name - Name of the primary supplier site of the item. • Parent Item Description - Description of the item parent. Only displays if the item being viewed is a child item. • Parent Item Number - ID for the item parent. Only displays if the item being viewed is a child item.
Differentiators	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. • Total Cost - Represents the total cost of the item on the order in the order currency. • Total Quantity - Indicates the order quantity for the item across all locations on the order.
Locations	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: • Location - Shows the location name and ID. • Total Cost - Shows the total cost of the item at the location on the order. • Ordered Quantity - Shows the total quantity ordered for the item at this location.
Available Actions	You will have one or more actions available to perform on the order, based on your user privileges. Available actions include: • Approve • Reject • Cancel Order • Update Dates • Share

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# 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

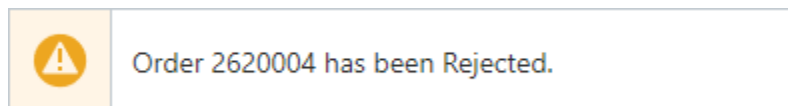1. To approve an order, tap **Approve**. A notification appears confirming the approval.

   Figure 6-1   Approval Notification

   Order 2610014 has been Approved.
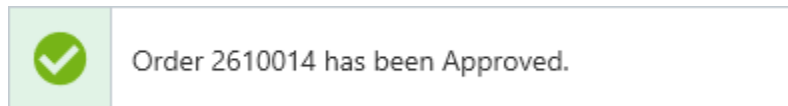
Reject an Order

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

   Figure 6-2   Confirm Reject Pop-up Window

   Order 2620004 has been Rejected.
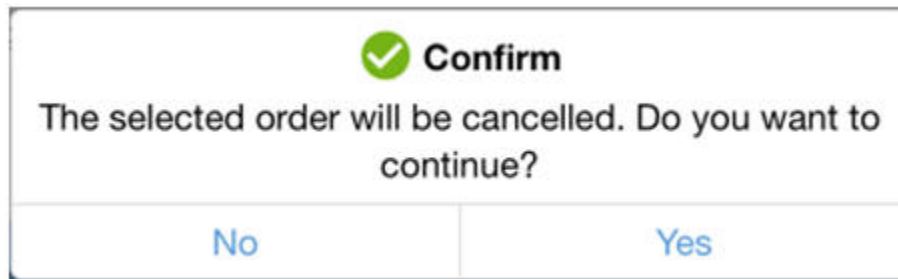
Cancel an Order

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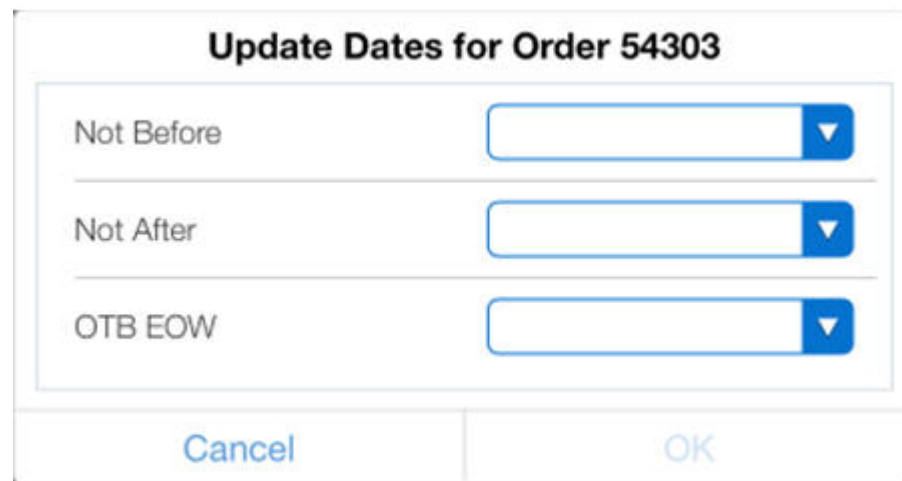3. Tap **OK**. A notification appears confirming the cancellation.

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

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
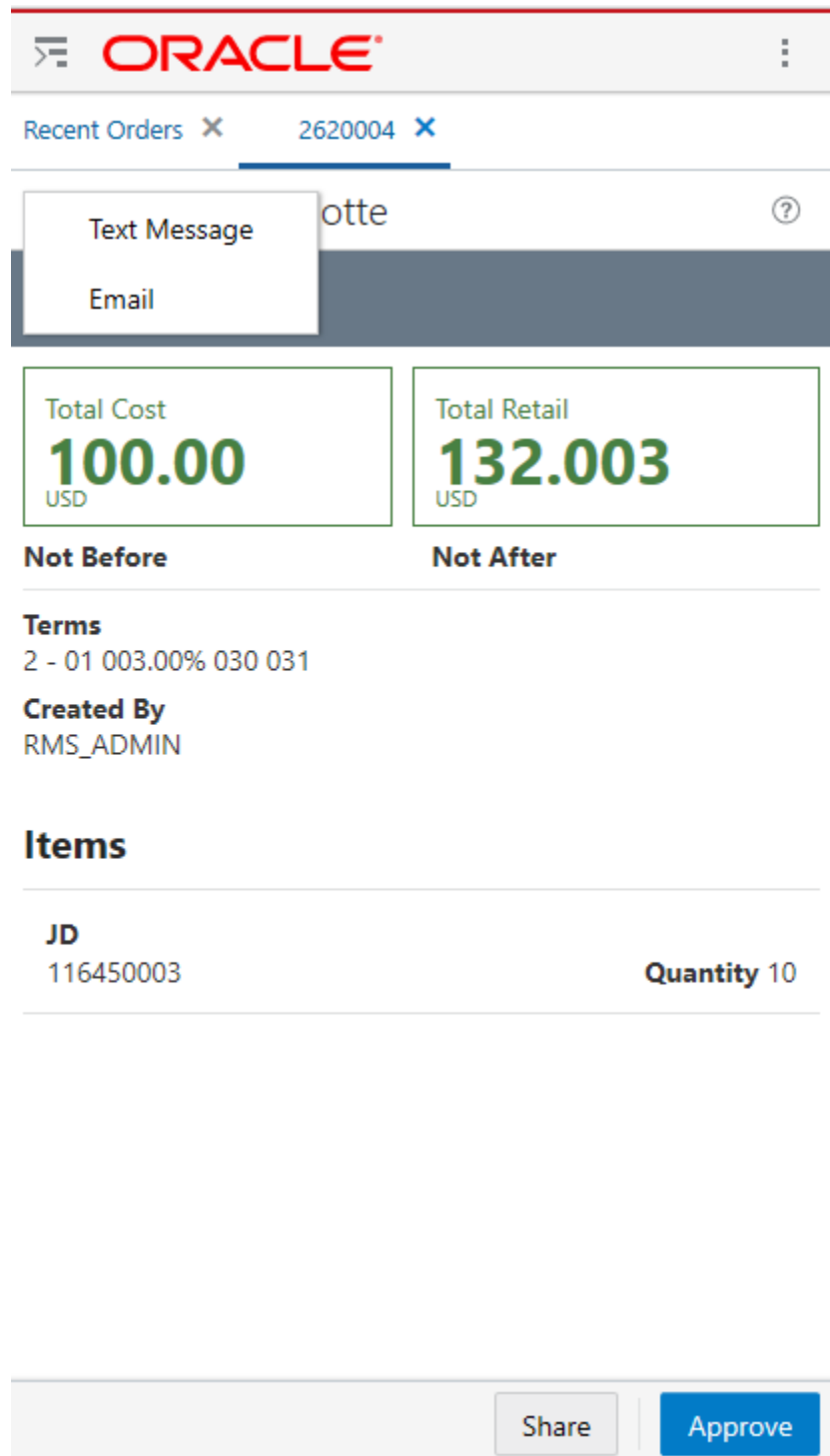
2. Tap either Text Message or the Email.

    Text Message

3. For Text Message, enter the mobile number in the To: box and any message in the section below it.
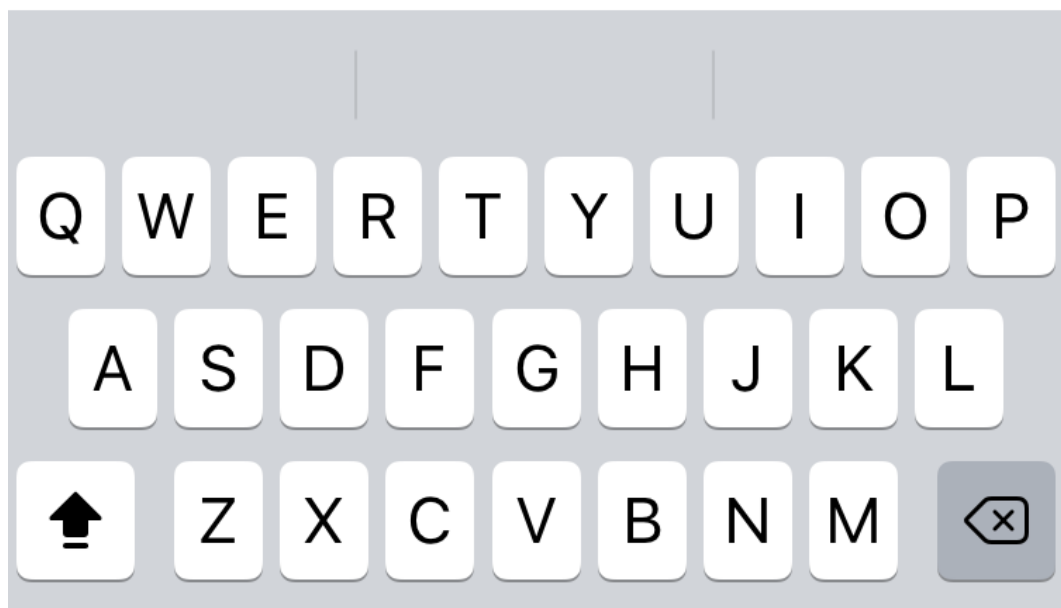
Figure 6-7   New Message Window

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.