Oracle® Retail Merchandising Foundation Cloud Service

Recent Transfers Mobile User Guide

Release 23.1.201.0

F80213-01

April 2023

ORACLE®

Oracle Retail Merchandising Foundation Cloud Service Recent Transfers Mobile User Guide, Release 23.1.201.0

F80213-01

Contents

List of Figures

Send Us Your Comments

Oracle® Retail Merchandising Foundation Cloud Service Recent Transfers Mobile User Guide, Release 23.1.201.0

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 Recent Transfers Mobile 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 Recent Transfers Mobile. 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.

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.

This process will prevent delays in making critical corrections available to customers. For the customer, it means that before you begin installation, you must verify that you have the most recent version of the Oracle Retail documentation set. Oracle Retail documentation is available on the Oracle Technology Network at the following URL:

`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 Retail Documentation on the Oracle Help Center (docs.oracle.com)

Oracle Retail product documentation is also 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
Overview

This guide describes the methods by which you review recent transfers from Merchandising that are in worksheet and submitted status and approve one or multiple transfers. It also describes the user interface controls in more detail.

The following topics are discussed in this guide:

- Getting Started
- Recent Transfers
- Recent Transfers Detail

2

Getting Started

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 Transfers mobile workflows.

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

Accessing the Recent Transfers Workflow

To access the Recent Transfers workflow:

1. **Login** to the application.

Figure 2-1   Login Screen
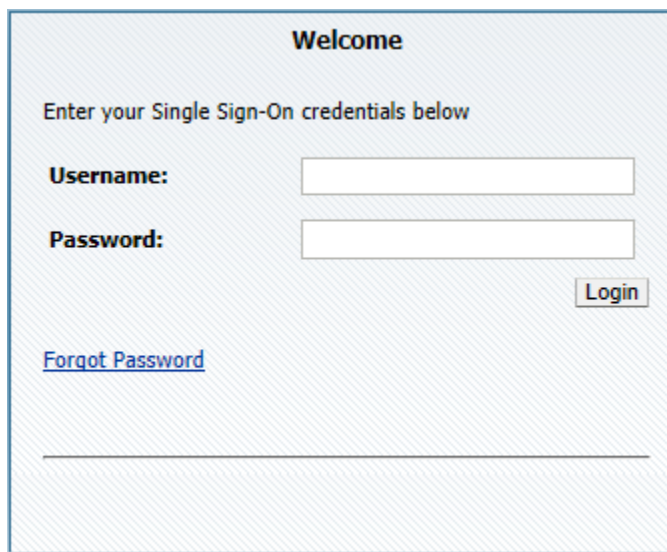
2. Tap the **Menu** icon. The Merchandising options appear.

Figure 2-2   Merchandising Options
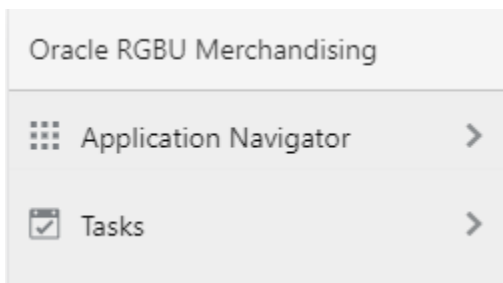
3. Tap **Tasks**. The Task Options appear.

Figure 2-3   Task Options
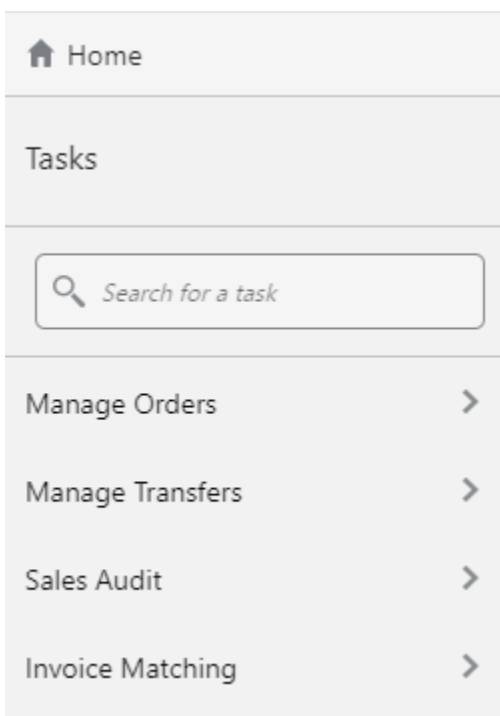
4. Tap **Manage Transfers**. The Recent Transfers option appears.

Figure 2-4   Manage Transfers Menu Option
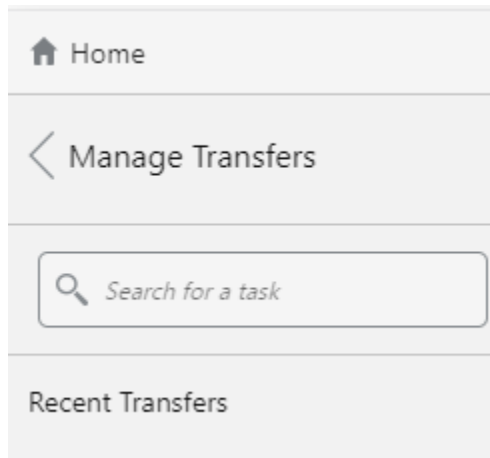
5. Tap **Recent Transfers**. The initial Recent Transfers criteria screen appears.

Figure 2-5   Recent Transfers Screen

3

Recent Transfers

Overview

The Recent Transfers screen displays a list of Recent Transfers based on the criteria selected. Actions include tapping a Transfer in the list, which allows you to quickly select approve, reject, or share based on specified criteria.

Figure 3-1   Recent Transfers Screen

Field	Description
Status Icon	An icon representing the status of the transfer.
From/To	Lists the From Site and then the To Site.

Field	Description
Transfer ID	The ID of the Transfer.
Status	The description of the status of the transfer: • Input • Submitted • Approved • In Progress • Closed
Total Cost	The total cost of the transfer based on the from location currency. Example: 10,000.00 USD

Filter Criteria

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

1. **Login** to the application.

2. Tap the **Menu** icon.

3. Tap **Tasks**.

4. Tap **Manage Transfers**.

5. Tap **Recent Transfers**.

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

Figure 3-2   Recent Transfers Filter Criteria Screen

Field	Description
Status	Limits the orders returned by an order's current status. You can select from a status or Any Status to return results. Valid values include: Any Status (Default), Input, Submitted, Approved, In Progress, and Closed. Any Status is the default. It only returns the statuses listed above and will not include closed orders.
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.
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).
Delivery Date	Defined as the earliest date a transfer can be delivered to a store. Valid values include: Today, Last 2 days, Last 7 days, Last 30 days, and All Dates (Default).
Transfer Type	Limits the returned transfers based on the transfer type.
	Valid values include: Any Type (Default), Administrative, AIP Generated Transfer, Book Transfer, Confirmation, Externally Generated, Franchise Order, Franchise Return, Intercompany, Manual Requisition, PO-Linked Transfer, Reallocation Transfer, Return to Vendor, System Generated Transfer, SIM Generated Transfer, and Store Requisition.
Locations	Limits the returned orders to only those that have corresponding items in the specified locations.
Department	Limits the returned transfers to only those that have corresponding items in the specified departments.

7. 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 Recent Transfers screen appears with the results.

Figure 3-3   Recent Transfers Screen
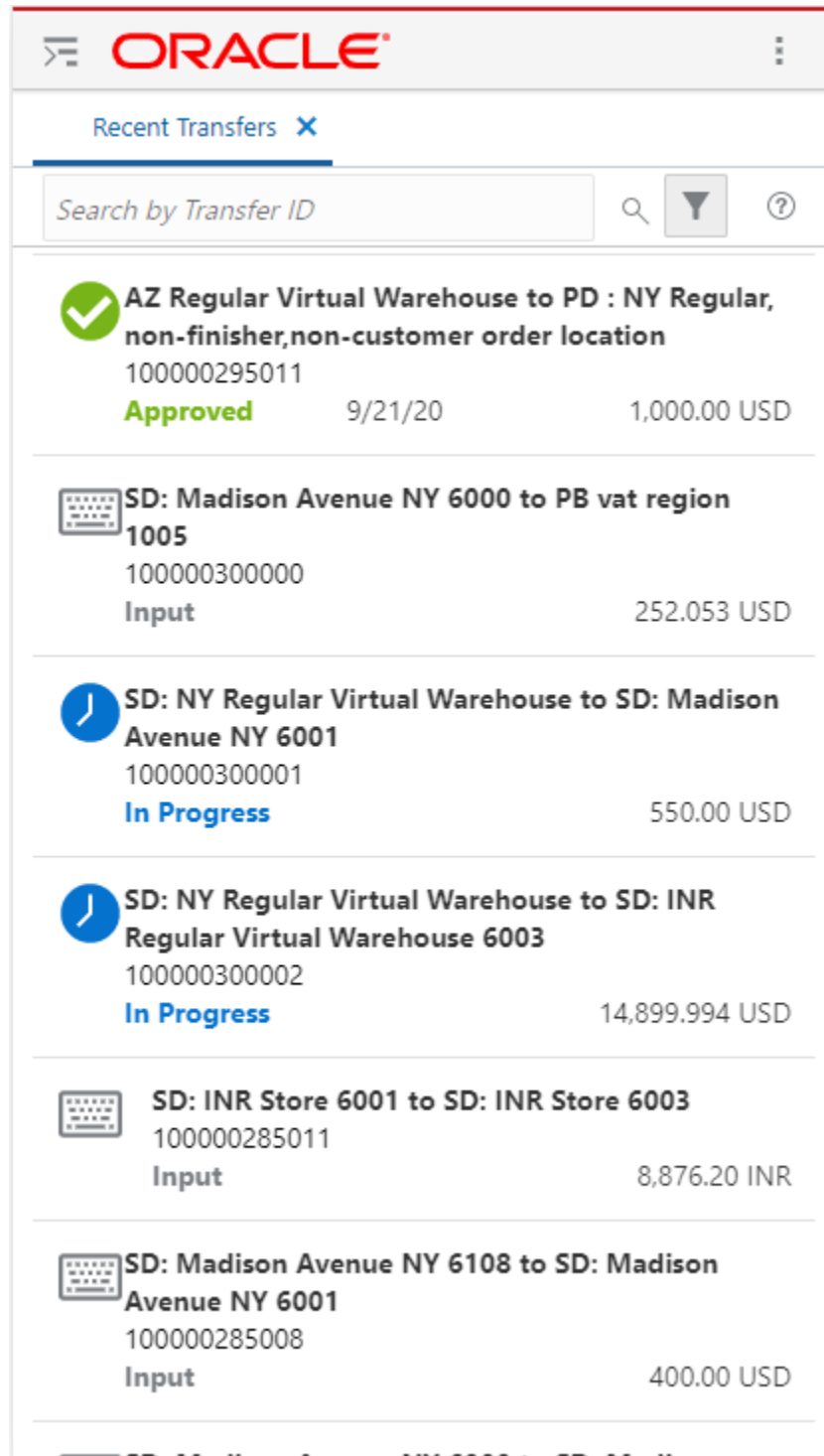
The following criteria has the ability to search for specific information:

- Created By
- Departments

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

- All Users X icon.
- All Departments X icon.

> **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 the same process:

1. Tap the Created By criteria: All Users X icon to delete the criteria.
2. Tap anywhere in the Search by User box. The keyboard appears.

Figure 3-4   Add User
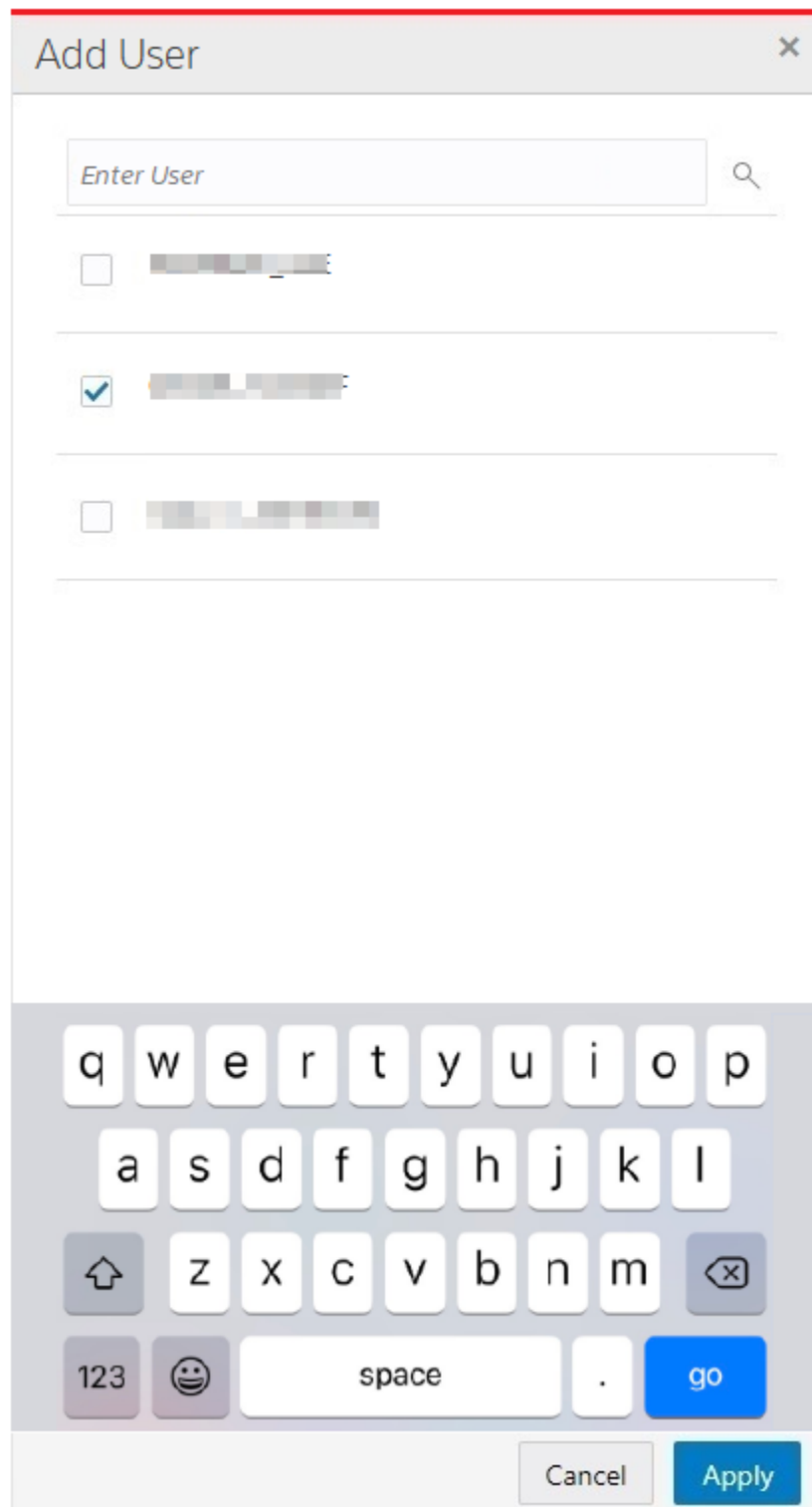
3. Enter all or part of a user name. As you type, the list of names dynamically change.

4. Check the box for 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. Tap **Apply**. The recent orders for the selected users appear in the list.

> **Note:**
>
> The Department and Supplier Site search also follow a similar workflow.

Figure 3-5   Recent Transfers Screen

Search by Transfer ID: Enter all or part of a Transfer ID in the Search by Transfer ID field. The Transfer IDs dynamically update as you type in the value.

4

Recent Transfers Detail

The Recent Transfers Detail screen displays the Transfer details based on your selection from the Recent Transfers screen. To access the Transfer details, tap on any transfer in the transfers area. The Transfer Detail screen appears.

1. Tap any transfer from the list of available transfers. The Transfer Detail screen appears.

Figure 4-1   Transfer Details

Field	Description
Status	Status types include: • Input • Submitted • Approved • In Progress • Closed
From/To	Lists the From Site and then the To Site.
Total Cost	The total cost of the transfer in order based on the from location currency. Example: 10,000.00 USD
Total Retail	The total retail for the transfer based on the from location currency.
Delivery	The Delivery Date field represents the earliest date that the transfer can be delivered to the store.
Create By	The Create By field represents the Created By identifier. It is the user's Merchandising user ID.
Created Date	The Created Date field represents the date the transfer was created.
Items Area	This area represents the item(s) on the Transfer. The Item description and number are displayed. The Quantity field displays the number of units transferred at the item level. A Load More Rows button located at the end of the item list allows you to scroll to see more items, if applicable.
Actions Area	The Approve button, if enabled, allows you to approve the transfer. Applies only to transfers in Input or Submitted status. The Reject button, if enabled, allows you to reject the Transfer. Applies only to transfers in Submitted status. The Share icon enables you to clarify information about the transfer or provide an explanation for why it cannot be approved in its current state, via SMS or e-mail to a contact.

Transfer Status	User Privilege	Available Actions
Input	View Transfers	Share
Input	Maintain Transfers	Share
Input	Approve Transfers	Approve, Share
Submitted	View Transfers	Share
Submitted	Maintain Transfers	Reject, Share
Submitted	Approve Transfers	Approve, Reject, or Share
Approved	All Privileges	Share
In Progress	All Privileges	Share

Approve a Transfer

1. To approve a transfer, tap **Approve**. A notification appears confirming the approval.

Figure 4-2   Approval Notification

Reject a Transfer

1. To reject a transfer, tap Reject. A notification appears confirming the rejection.

Figure 4-3   Rejection Notification

Share a Transfer

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

1. Login to the application.

2. Tap the **Share** button.

3. Tap either the SMS icon or the E-mail icon.

Figure 4-4   SMS Example
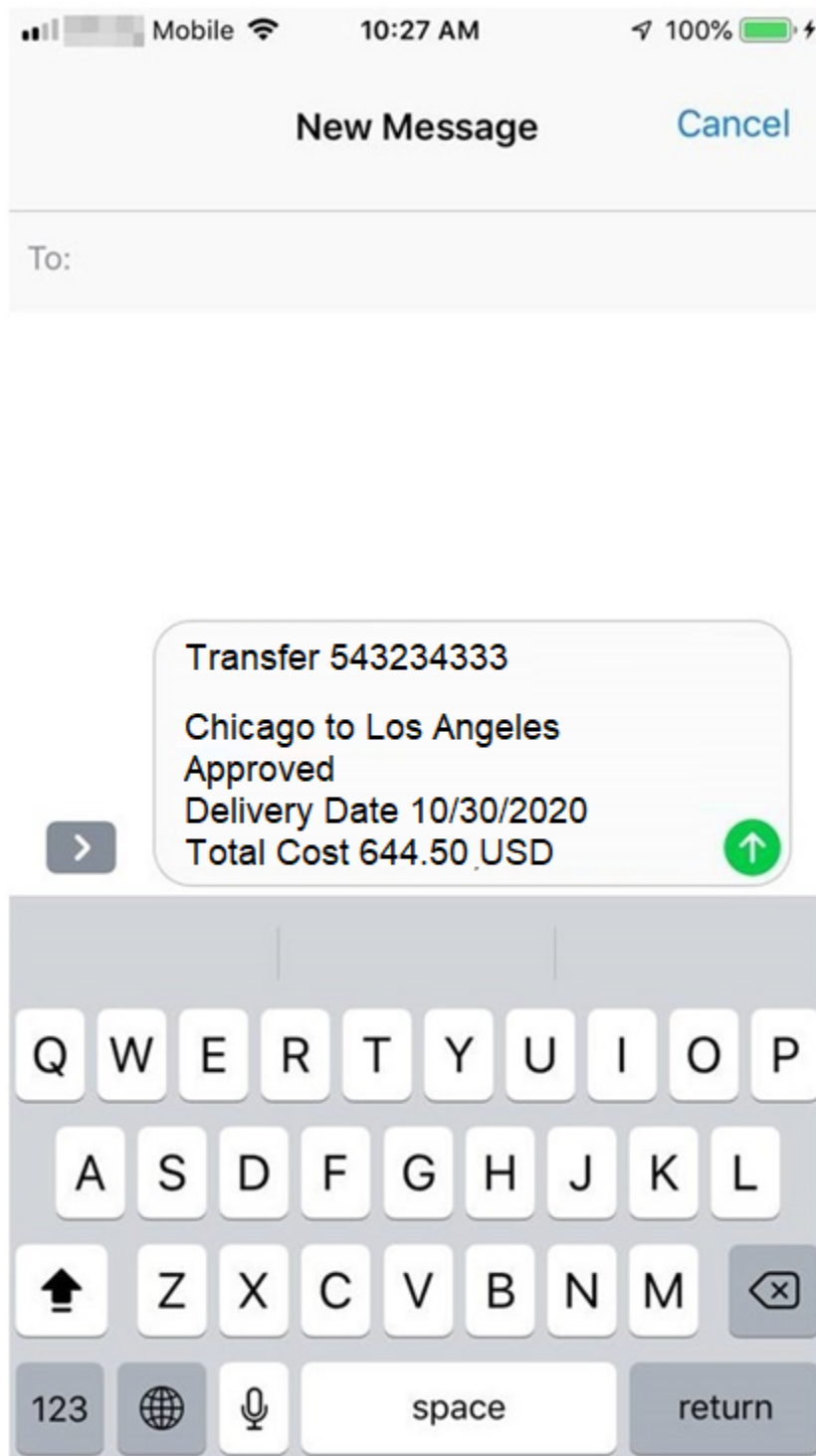
4. For SMS, enter the mobile number. For E-mail, enter the e-mail address.

5. Tap **Send**.