# Oracle®Retail Merchandising Cloud Services

# Release Readiness Guide

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OracleRetail Merchandising Cloud Services Release Readiness Guide, Release 23.1.401.0

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# Preface

This guide outlines the information you need to know about Oracle Retail Merchandising Foundation Cloud Services new or improved functionality in this update, and describes any tasks you might need to perform for the update. Each section includes a brief description of the feature, the steps you need to take to enable or begin using the feature, any tips or considerations that you should keep in mind, and the resources available to help you.

**Audience**

This document is intended for the users and administrators of the Oracle Retail Merchandising Foundation Cloud Services.

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- 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

**Oracle Help Center (docs.oracle.com)**

Oracle Retail Product documentation is available on the following website https://docs.oracle.com/en/industries/retail/html

**Comments and Suggestions**

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**Oracle Retail Cloud Services and Business Agility**

Oracle Retail Merchandising Foundation Cloud Services is hosted in the Oracle Cloud with the security features inherent to Oracle technology and a robust data center classification, providing significant uptime. The Oracle Cloud team is responsible for installing, monitoring, patching, and upgrading retail software.

Included in the service is continuous technical support, access to software feature enhancements, hardware upgrades, and disaster recovery. The Cloud Service model helps to free customer IT resources from the need to perform these tasks, giving retailers greater business agility to respond to changing technologies and to perform more value-added tasks focused on business processes and innovation.

Oracle Retail Software Cloud Service is acquired exclusively through a subscription service (SaaS) model. This shifts funding from a capital investment in software to an operational expense. Subscription-based pricing for retail applications offers flexibility and cost effectiveness.

# 1

# Feature Summary

Oracle Retail Merchandising Cloud Services 23.1.401.0 is a Critical Update.

This chapter describes the feature enhancements in this release.

## Noteworthy Enhancements

This guide outlines the information you need to know about new or improved functionality in the Oracle Retail Merchandising Cloud Services update and describes any tasks you might need to perform for the update. Each section includes a brief description of the feature, the steps you need to take to enable or begin using the feature, any tips or considerations that you should keep in mind, and the resources available to help you.

**Column Definitions**

- **Feature:** Provides a description of the feature being delivered.
- **Module Impacted:** Identifies the module associated with the feature, if any.
- **Scale:** Identifies the size of the feature. Options are:
  - **Small:** These UI or process-based features are typically comprised of minor field, validation, or program changes. Therefore, the potential impact to users is minimal.
  - **Large:** These UI or process-based features have more complex designs. Therefore, the potential impact to users is higher.
- **Delivered:** Is the new feature available for use immediately after upgrade or must the feature be enabled or configured? If no, the feature is non-disruptive to end users and action is required (detailed steps below) to make the feature ready to use.
- **Customer Action Required:** You must take action before these features can be used. These features are delivered disabled and you choose if and when to enable them.

**Table 1-1    Noteworthy Enhancements**

| Feature | Module Impacted | Scale | Delivered | Customer Action Required? |
|---|---|---|---|---|
| Add Option to Calculate Invoice Due Date Based on Invoice Receipt Date | Invoice Matching | Small | Disabled | Yes |
| Enhance EDI and Induction Flows to Optionally Skip Putting Prefixes on Document ID | Invoice Matching | Small | Enabled | No |
| Apply Deals Automatically to Any Auto-Generated Order | Merchandising | Small | Disabled | Yes |

**Table 1-1    (Cont.) Noteworthy Enhancements**

| Feature | Module Impacted | Scale | Delivered | Customer Action Required? |
|---|---|---|---|---|
| Enhanced Ability to Add Items to an Item List by Below Transaction Level Items Through Upload List | Merchandising | Small | Enabled | No |
| Enhancement in Get Next Order/ Transfer/Allocation Number ReST Services to Return Multiple Entity IDs | Merchandising | Small | Enabled | No |
| Enhancement to Apply Customer Engagement Promotions on Vendor Funded Deals | Merchandising | Small | Disabled | Yes |
| Export RDWS and RDWC Data into Staging Table for Export to 3rd Party Data Warehouse | Merchandising | Large | Disabled | Yes |
| Harmonized Tariff Schedules (HTS) and Expense in Item Publish ReST Service | Merchandising | Small | Enabled | No |
| Item/Location Ranging Management ReST Service | Merchandising | Small | Enabled | No |
| Parent Item Level UDA Updates to Child Items | Merchandising | Small | Enabled | No |
| Purchase Order Pickup Date to Consider Supplier/Warehouse Delivery Schedules | Merchandising | Small | Disabled | Yes |
| Price Below Cost Validation | Pricing, Merchandising | Small | Disabled | Yes |

# Add Option to Calculate Invoice Due Date Based on Invoice Receipt Date

A system option has been added that allows the due date to be calculated based on the date the invoice was received from the supplier, rather than using the document date, or the receipt of goods date. When selected, the invoice due date will be calculated using the date the invoice was received. When this new parameter is not selected (checked), the invoice document date will be used (default behavior).

## Steps To Enable

1. From the Invoice Matching Task List, select **Foundation > System Options**.

2. In the Document Parameters section, check the option **Use Invoice Received Date to Calculate Due Date** and save your changes.

## System Option Updates

| Attribute Name | New/Updated? | Description | Patch Default |
|---|---|---|---|
| USE_INV_RCV_DT_TO_CALC_DUE_DT | New | This attribute when set will calculate the due date base on the date the invoice was received from the vendor. | N |

# Enhance EDI and Induction Flows to Optionally Skip Putting Prefixes on Document ID

This feature introduces a new system option which when set to Y, will not append the document specific prefix to the External Document ID (ext_doc_id) column in the process of document creation. When this value is set to N, the application behaves as previous and will append the prefix.

To control the behavior, a new system option provides the ability to override adding a prefix to the document ID on externally generated documents including documents added via EDI, Spreadsheet Induction, ReST services, and Bulk Upload (XML). Resolution documents and documents entered through the User Interface (UI) will continue to include a Prefix.

## Steps to Enable

1. From the Invoice Matching Task List, navigate to **Foundation>System Options**.

2. In the Document Prefixes section check the **Exclude Prefix on Externally Sourced Documents** option.

## System Option Updates

| Attribute Name | New/Updated? | Description | Patch Default |
|---|---|---|---|
| EXCL_PRFX_ON_EXTL_SRCD_DOCS | New | Indicates whether or not the system will include a prefix on the document identifier for externally generated documents. Valid values are Yes (Y) or No (N). Set this option to No (N) if you wish to exclude prefixes on externally generated documents. This system option can be changed at any time, but the change will only affect documents created after this option is updated. For instance, if you toggle from No (N) / unchecked to Yes (Y) / checked, all external documents entered in the future will include a prefix, but any external documents which were already created without prefixes will not be changed. If you toggle from Yes (Y) / checked to No (N) / unchecked, no external documents entered in the future will have a prefix, but prefixes on existing documents will be retained. | N |

# Apply Deals Automatically to Any Auto-Generated Order

Previously, off-invoice deals were getting applied only to the replenishment generated and vendor generated orders if approved. With this update, deals will now be applied to non-approved replenishment generated and vendor generated orders as well during the nightly run of the Approve Replenishment Orders (rplapprv) batch job.

## Steps to Enable

To enable the application of off-invoice deals to all auto-generated purchase orders the system parameter for **Auto Apply Deals to Worksheet POs** must be changed to **Y** (checked).

## System Options Updates

| Attribute Name | New/Updated? | Description | Patch Default |
|---|---|---|---|
| AUTO_APPLY_DEAL_W KSHT_PO | New | Indicates whether or not deals will be automatically applied to replenishment generated and vendor generated worksheet orders. Valid values are Yes (Y) or No (N). | N |

## DAS/RDS Updates

| | | | |
|---|---|---|---|
| PROCUREMENT_UNIT_ OPTIONS | RDS_WV_PROCUREME NT_UNIT_OPTIONS | Update | New column AUTO_APPLY_DEAL_W KSHT_PO is added which indicates whether or not off-invoice deals will be automatically applied to replenishment generated and vendor generated worksheet orders. |
| PROCUREMENT_UNIT_ OPTIONS | DAS_WV_PROCUREME NT_UNIT_OPTNS | Update | New column AUTO_APPLY_DEAL_W KSHT_PO is added which indicates whether or not off-invoice deals will be automatically applied to replenishment generated and vendor generated worksheet orders. |
| SYSTEM_OPTIONS | DAS_WV_SYSTEM_OPT NS | Update | New column AUTO_APPLY_DEAL_W KSHT_PO is added which indicates whether or not off-invoice deals will be automatically applied to replenishment generated and vendor generated worksheet orders. |

| SYSTEM_OPTIONS | RDS_WV_SYSTEM_OPT IONS | Update | New column AUTO_APPLY_DEAL_W KSHT_PO is added which indicates whether or not off-invoice deals will be automatically applied to replenishment generated and vendor generated worksheet orders. |
|---|---|---|---|

# Enhanced Ability to Add Items to an Item List by Below Transaction Level Items Through Upload List

This Merchandising update introduces an enhanced ability to add items to an item list. When using Upload List workflow, below transaction level items can be used to add items.

# Enhancement in Get Next Order/Transfer/Allocation Number ReST Services to Return Multiple Entity IDs

An enhancement has been made to the order/Transfer/Allocation publication ReST APIs to return multiple entity ids.

A count parameter, which will contain a list of numbers, has been added in the following three ReST services to return multiple numbers in the same service .

- RmsReSTServices/services/private/Transfer/transferId
- RmsReSTServices/services/private/Alloc/allocNo
- RmsReSTServices/services/private/PurchaseOrders/order/id

## Integration Changes

| RmsReSTService s/services/ private/Alloc/ allocNo | Update | REST Service | allocNumbers | Contains list of available allocation numbers |
|---|---|---|---|---|
| RmsReSTService s/services/ private/ PurchaseOrders/ order/id | Update | REST Service | orderNumbers | Contains list of available order numbers. |
| RmsReSTService s/services/ private/ Transfer/ transferId | Update | REST Service | transferNumber s | Contains list of available transfer numbers. |

# Enhancement to Apply Customer Engagement Promotions on Vendor Funded Deals

In this cloud service update, the existing integration between Sales Audit and Customer Engagement (ORCE) has been extended to collect ORCE promotions in the MFCS schema, so they can be used for both Sales Audit validations (current) and association to vendor deals. This enhancement allows promotions authored in Customer Engagement to be used to accrue deal income based on sales, in the same way promotions authored in the Pricing Cloud Service can be used.

A new column PROMO_SOURCE has been added in table DEAL_PROM & DEAL_COMP_PROM to distinguish between promotion sources (Pricing Cloud Service vs Customer Engagement) when associating them to vendor deals. The Deal Upload batch (dealupld) was modified to be backward compatible by including additional runtime parameter added for the file version. A Promotion Source dropdown has been added in the Add/Edit pop up of the Promotions screen in the Deals taskflow

## Steps to Enable

Most of this enhancement will be delivered enabled, but if you require the ability to upload deals containing the promotion source the previously mentioned runtime parameter must be adjusted to include the updated file version.

# Export RDWS and RDWC Data into Staging Table for Export to 3rd Party Data Warehouse

The batch saexport_sales_to_dw is the replacment for the previous file-based saexpdw.pc batch. The new batch will export the data into staging tables and has been designed to integrate with Oracle Retail AI Foundation, which includes Retail Insights. For integration with Oracle Retail Insights, this batch will export RDWT and RDWF data to three tables at the store/day level.

This enhancement was to include the feature to integrate with a 3rd Party analytics or data warehouse system.

For integration with a 3rd Party application, the batch saexport_sales_to_dw now additionally export RDWS and RDWC data to two more tables at the store/day level:

- SA_EXPDW_RDWS_DETAIL – Store Totals are exported to this table.
- SA_EXPDW_RDWC_DETAIL – Cashier/Register Totals are exported to this table.

The export of RDWS and RDWC data to SA_EXPDW_RDWS_DETAIL and SA_EXPDW_RDWC_DETAIL is controlled by a Y/N flag defined in the MERCH_BATCH_PARAM table for batch_name of SAEXPDW_EXPORT_JOB and param_key of EXPORT_DW_S_C. The default value of the flag is N.

## Steps to Enable

New system option **Use Delivery Schedules for Delivery Dates** should be checked to use this functionality.

## System Option Updates

| Attribute Name | New/Updated? | Description | Patch Default |
|---|---|---|---|
| Use Delivery Schedules for Delivery Dates | New | Determines whether Location Delivery Schedule set up will be used for Pickup Date calculation or not. | N |

# Harmonized Tariff Schedules (HTS) and Expense in Item Publish ReST Service

This service update includes an enhancement to the Item Publish ReST Service to include HTS and expense.

# Item/Location Ranging Management ReST Service

This cloud service update includes a new ReST Service for loading item/location ranging candidates and status changes. Item/Location details loaded via this ReST service will be processed by the Scheduled Item Maintenance (SITMAIN) batch process. Unlike the Scheduled Item Maintenance changes managed on-line, this ReST service accepts item/location level details versus the combination of an Item List and Location List as is the case in the on-line screen.

This ReST service provides the capability to create and maintain requests to update item/location status from an external system or source. This service takes in a collection of item locations along with the desired status and the effective date upon which each update should take place.

# Parent Item Level UDA Updates to Child Items

With this update, Item UDA functionality has been modified to avoid overriding UDA updated at the parent item level to child items.

# Purchase Order Pickup Date to Consider Supplier/Warehouse Delivery Schedules

The Calcuation of Pick Up Date for a purchase order has been enhanced to consider the supplier and warehouse delivery schedule. This enhancement ensures that pickup date calculation considers when the supplier or warehouse is closed.

# Price Below Cost Validation

Within a retailer's setup, as well as legally for certain geographies, it is important to maintain the retail value of an item that is greater than or equal to the cost of the item

at the location level, irrespective of the location type. This cloud service update includes a new validation that can be enabled to ensure retail price changes are not created with a value less than the cost. In cases where the system identifies a price below cost situation, the application user can review the item/location's in violation and choose to override or make adjustments to the retail price. This validation is meant to prevent any incorrect values from getting communicated to other downstream applications, such as the Point of Sale or the retailer's website.

When enabled, validation will occur when price change and clearance events are approved, as the conflict check rules are being applied. In addition, cost change events created in Merchandising, such a supplier cost change and deals, will validate against the retail price to ensure that a change to the cost does not result in the same condition.

## Steps to Enable

The following conflict rules that are being added as a part of this change would need to be enabled by the user through the spreadsheet upload present within Merchandising (**Price and Cost > Price Event Conflict Rules**) by setting the **Rule Enabled** column to Y (Yes) :

- **Rule 12** - Regular Retail must be greater than or equal to the Pricing Cost
- **Rule 13** - Clearance Retail must be greater than or equal to the Pricing Cost

## Privileges

| Priv Name | Change Type | Priv Description | Parent Duty |
|---|---|---|---|
| OVERRIDE_CLEAR_RETAIL_BELOW_COST_CONFLICTS_PRIV | New | A privilege for the ability to override clearance retail below cost conflicts found when attempting to submit or approve a clearance event. | CONFLICT_CLEAR_RETAIL_BELOW_COST_OVERRIDE_DUTY |
| OVERRIDE_REG_RETAIL_BELOW_COST_CONFLICTS_PRIV | New | A privilege for the ability to override regular retail below cost conflicts found when attempting to submit or approve a price change event. | CONFLICT_REG_RETAIL_BELOW_COST_OVERRIDE_DUTY |

## Duties

| Duty Name | Change Type | Duty Description | Child Duty | Base Role |
|---|---|---|---|---|
| CONFLICT_CLEAR_RETAIL_BELOW_COST_OVERRIDE_DUTY | New | A duty for the ability to override clearance price below cost conflicts found when attempting to submit or approve a clearance event. | | |

| Duty Name | Change Type | Duty Description | Child Duty | Base Role |
|---|---|---|---|---|
| CONFLICT_REG_R ETAIL_BELOW_C OST_OVERRIDE_D UTY | New | A duty for the ability to override regular price below cost conflicts found when attempting to submit or approve a price change event. | | |

# 2

# System Requirements

This chapter covers the Client System requirements for Oracle Retail Merchandising Cloud Services.

## Browser Requirements

> **Note:**
>
> If running Windows, Oracle Retail assumes that the retailer has ensured its Operating System has been patched with all applicable Windows updates.

The following web browsers are supported:

- Mozilla Firefox
- Microsoft Edge
- Google Chrome (Desktop)

Microsoft has deprecated Internet Explorer 11 in Windows 10 and recommends using Edge as the default browser. Refer to the Oracle Software Web Browser Support Policy for additional information.

# 3

# Deprecated Features

As part of the continuous delivery model for Cloud Services, features and technical components of a solution may be removed or replaced to enhance the security, performance, and overall quality of the Cloud Service. When this occurs, the deprecation of a feature or component will be announced in advance, allowing customers sufficient time to anticipate the change and transition to any enhanced replacement feature/component. After the deprecation is announced, the deprecated feature or component will remain in the solution until the planned removal date and will not be enhanced or made compatible with other new features.

For the full schedule of planned deprecations for this product, see the Deprecation Advisory accessed from the following MOS Documentation Library: Oracle Retail Merchandising Cloud Services Documentation Library at Doc ID 1585843.1