

Oracle® Retail Sales Audit

Store Day Review Mobile User Guide



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ORACLE®

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Oracle® Retail Sales Audit Store Day Review Mobile User Guide, Release 23.1.401.0

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Preface

This document describes the Oracle Retail Sales Audit 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 Sales Audit such as sales audit analysts, managers, and administrative personnel.

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

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

1

Overview

The Sales Audit mobile workflow provides on the go access and information about the status of store day audits. Providing at a glance data for the most delayed audits or those with the largest number of errors can focus an auditor's attention where it is most needed. The Sales Audit mobile workflows further aids auditors by allowing easy methods of communication with their team members which automatically includes selected content.

The mobile workflow enables you to view store days that have not passed the auditing process, giving you visibility to data status, over/short counts and values and error count. This information can be grouped by auditor giving users visibility to their auditors in most need of assistance in closing out their store days.

Sales Audit provides mobile access to two workflows, the Store Day Summary workflow and the Store Search workflow. Both of these workflows are accessed from the Sales Audit folder in the Tasks menu. The Store Detail and Store Day pages are accessed from both the Store Day Summary Dashboard and from Store Search. The chapters in this guide describe how to search, select and view store day information in the Store Day Summary and Store Search workflows.

The following topics are covered in this guide:

- [Getting Started](#)
- [Mobile Navigation Model](#)
- [Store Day Summary Dashboard](#)
- [Store Detail](#)
- [Store Day](#)
- [Store Search](#)

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

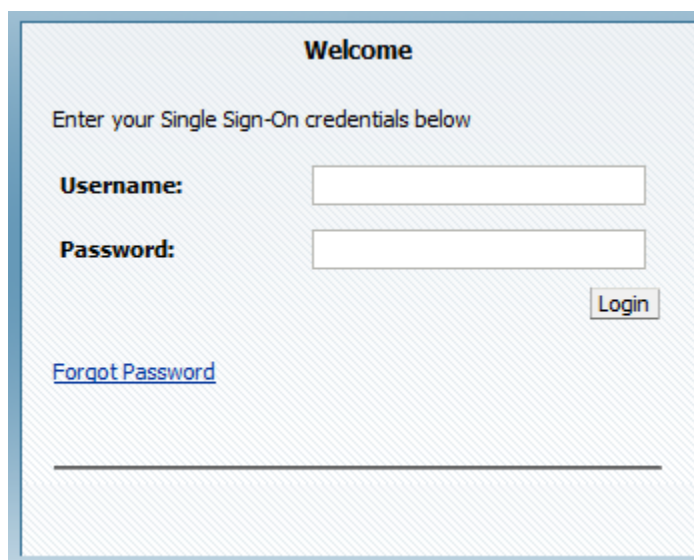
Access to each of the Merchandising mobile workflows and actions within are controlled by the same privileges which grant access to the same functional areas in the desktop applications. For example, a user with the ability to review and update store days in the Sales Audit desktop application, are able to perform those same actions in the Sales Audit mobile workflows.

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

Accessing Sales Audit

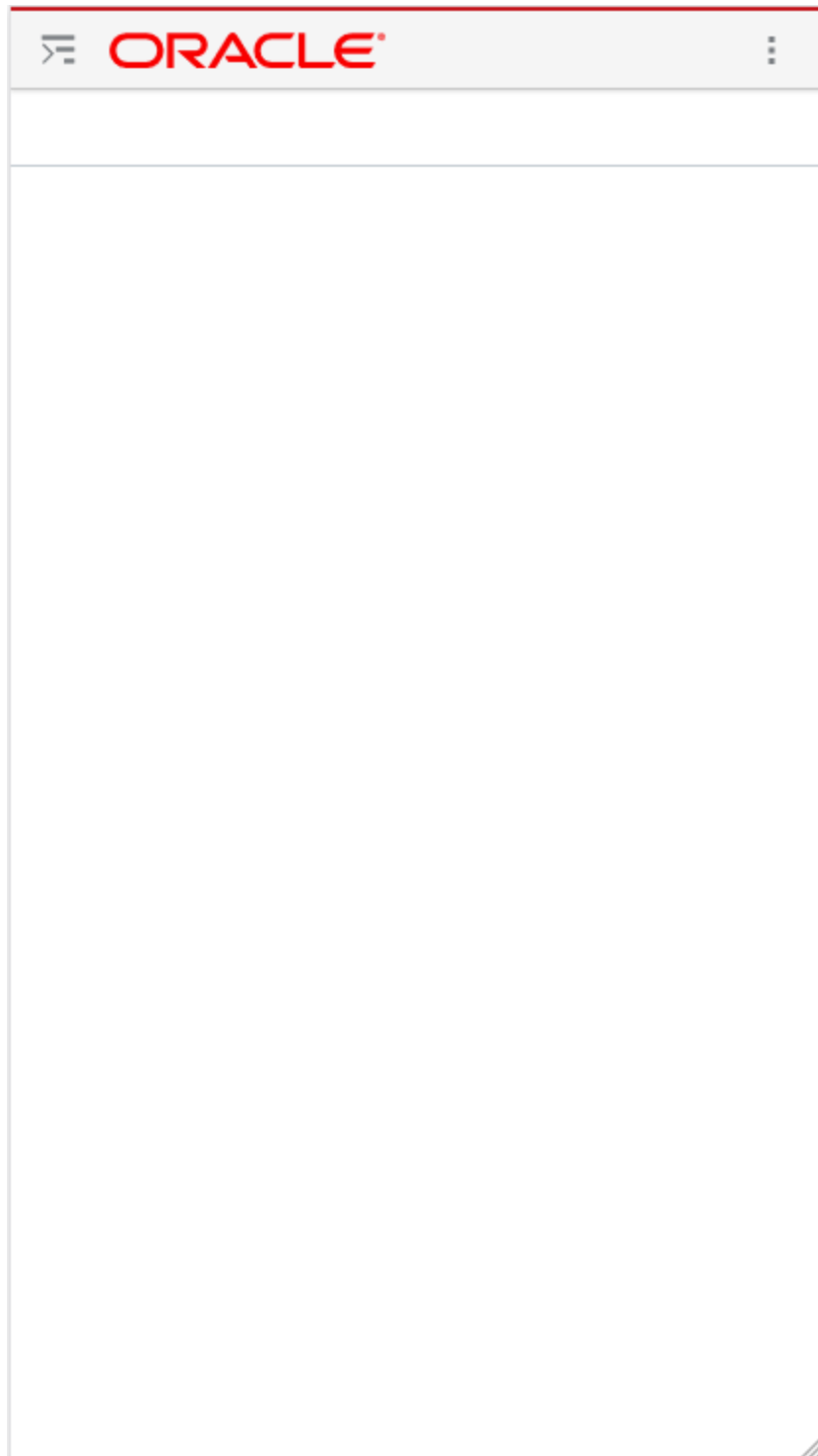
1. Login to the application. Enter your Username and Password.

Figure 2-1 Welcome Screen



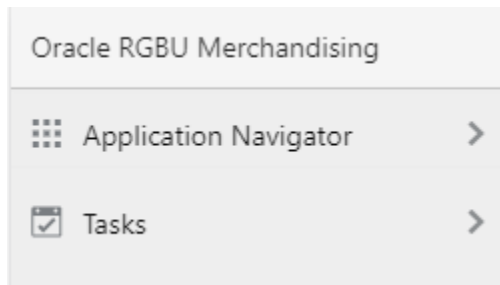
2. Tap **Login**. The Mobile Landing screen appears.

Figure 2-2 Mobile Landing Screen



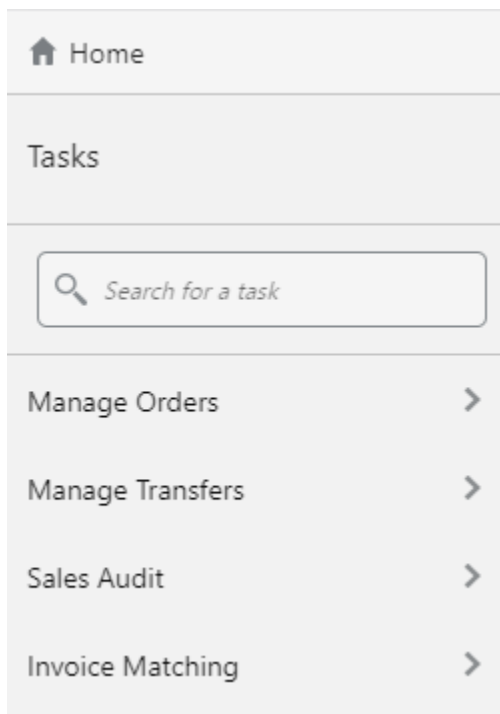
3. Tap the **Menu** icon in the upper left hand corner. The Merchandising options appear.

Figure 2-3 Merchandising Options



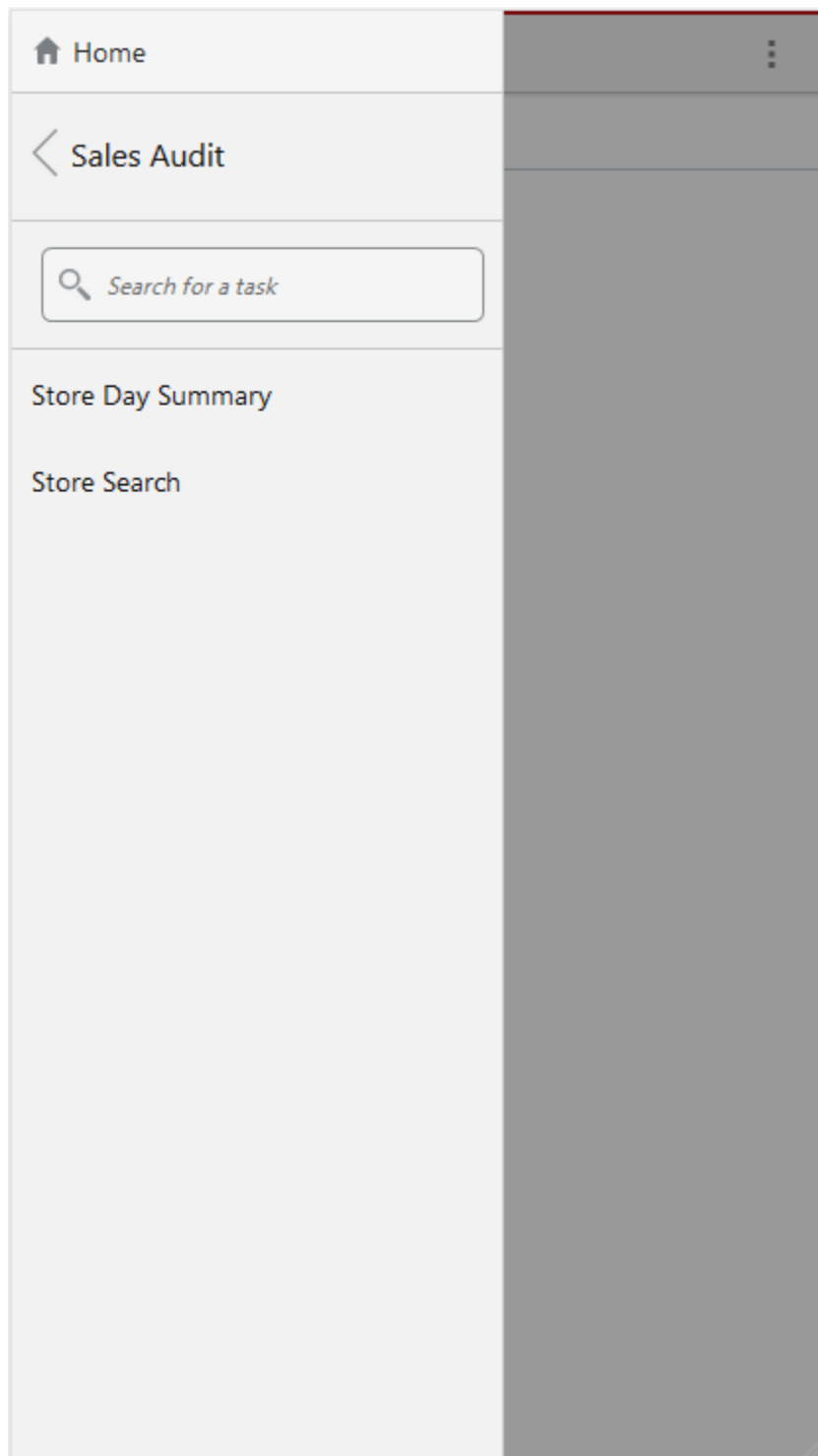
4. Tap **Tasks**. The Tasks options appear.

Figure 2-4 Tasks



5. Tap **Sales Audit**. The Sales Audit task options appear.

Figure 2-5 Sales Audit Task Options



There are two Sales Audit workflows in the Sales Audit Task menu:

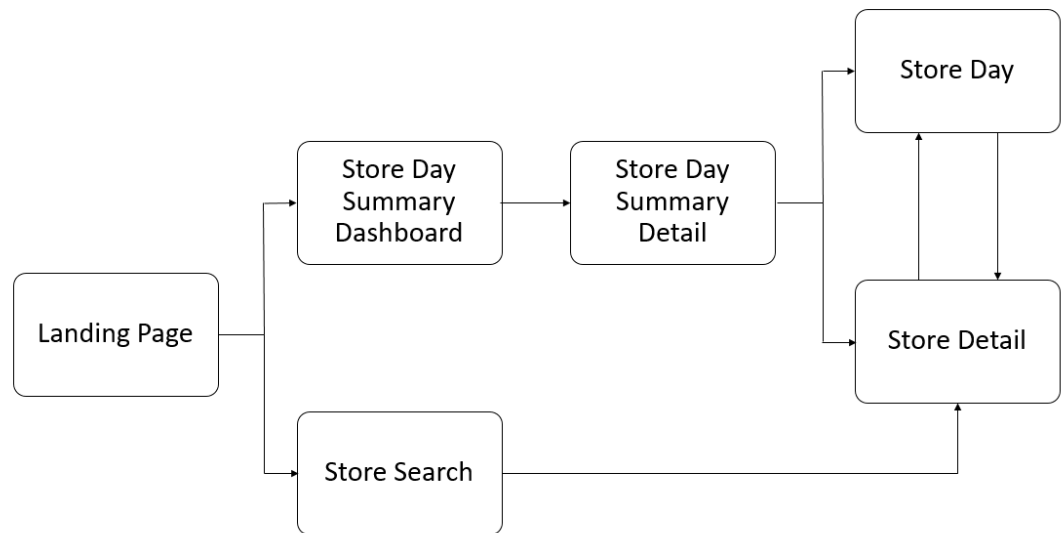
- The **Store Day Summary** workflow launches the Store Day Summary dashboard.
- The **Store Search** workflow launches the Store Search screen where you can search for a specific open store to view.

3

Mobile Navigation Model

The following illustration shows a portion of a sample navigation model.

Figure 3-1 Sales Audit Navigation Model



4

Store Day Summary Dashboard

You can see the following views in the Store Day Summary Dashboard:

- [Store Day Summary - Open Store Days](#)
- [Store Day Summary - Over/Short \(O/S\) Store Days](#)
- [Store Day Summary - Over/Short \(O/S\) Sums](#)
- [Store Day Summary - Error Count](#)
- [Store Day Summary Detail](#)

Store Day Summary - Open Store Days

The Store Day Summary - Open Store Days view shows the number of open stores for which the sales audit manager is responsible. The stores for which you are responsible are those associated with you in Sales Audit's employee maintenance using location traits.

To view the Store Day Summary - Open Store Days:

1. Login to the application and navigate to the Sales Audit task options, tap **Store Day Summary**. The Store Day Summary - Open Store Days screen appears.

Figure 4-1 Store Day Summary - Open Store Days

ORACLE	
Store Day Summary	
Open Store Days	
6/29/19 Saturday	2 Open
6/28/19 Friday	3 Open
6/27/19 Thursday	0 Open
6/26/19 Wednesday	3 Open
6/25/19 Tuesday	0 Open
Older	20 Open
All Days	28 Open

2. There are seven sections displayed in the Store Day Summary - Open Store Days view.
 - The first five sections contain the five most recent days, starting with yesterday (today's date minus 1).

- The date is displayed on the left side of the section with the day of the week displayed below it. The five dates displayed are today minus 1 through today minus 5.
 - The right side of the section contains the count of open stores to which you are assigned for the date followed by the word Open. If no open stores are found the count is displayed as 0 Open.
 - The length of the blue bar represents the number of open stores for each time period out of the total number of open stores, except the All Days sections.
3. If there are open stores to which you are assigned for dates beyond the initial five days (open days before today minus 5), the count of those stores is displayed in the section labeled **Older**. If no open stores are found the section will still display with a count of 0 Open.
 4. A total count of all open stores to which you are assigned is displayed in the section labeled **All Days**.
 5. You can view more details by tapping **anywhere** inside any of the seven sections. The details for that selection appear.

Store Day Summary - Over/Short (O/S) Store Days

The Store Day Summary - Over/Short Store Days view provides the count of overages and the count of shortages for all open store days on a given day for which the current user is responsible. If the Over/Short value for the store day is a positive value it is considered an overage; if the Over/Short value for the store day is a negative value it is a shortage.

To view the Store Day Summary - O/S Store Days:

1. From the Sales Audit Task list, tap **Store Day Summary**. The Store Day Summary - Open Store Days screen appears.
2. Tap the **Open Store Days** to view the four available Store Day Summary views.

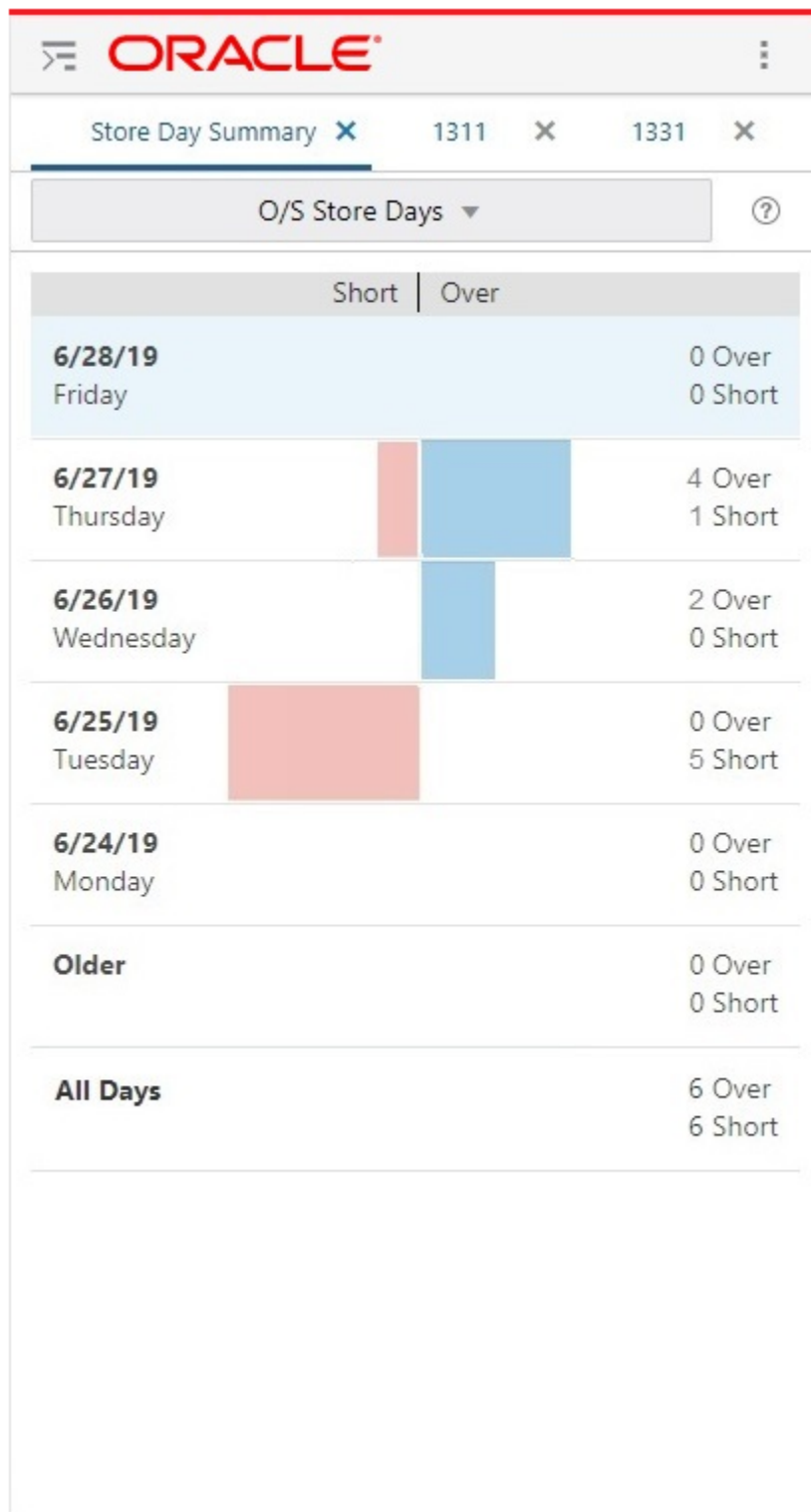
Figure 4-2 Store Day Summary Options List

The screenshot shows the Oracle Store Day Summary application interface. At the top is the Oracle logo. Below it are two tabs, both labeled 'Store Day Summary'. A blue dropdown menu is open, showing the following options: 'Open Store Days' (selected with a checkmark), 'O/S Store Days', 'O/S Store Sums', and 'Error Count'. The main content area displays a list of store days with their corresponding 'Open' counts. The list includes dates from 6/27/19 down to 'All Days'.

Store Day	Open Count
Open Store Days	2 Open
O/S Store Days	3 Open
O/S Store Sums	3 Open
Error Count	3 Open
6/27/19 Thursday	0 Open
6/26/19 Wednesday	3 Open
6/25/19 Tuesday	0 Open
Older	20 Open
All Days	28 Open

- Tap **O/S Store Days**. The screen refreshes and shows the Store Day Summary for O/S Store days.

Figure 4-3 O/S Store Days



4. The screen is divided into seven sections for O/S Store Days. Previously selected rows are indicated by a light blue color..
5. • The first five sections contain the five most recent days, starting with yesterday (today's date minus 1), each containing the count of open store days with overages

and the count of open store days with shortages. Only the stores to which you are assigned are shown here.

- The date is displayed on the left side of the section with the day of the week displayed below it. The five dates displayed are today minus 1 through today minus 5.
 - The right side of the screen displays the count of open stores to which you are assigned for the date followed by the word **Over** and the count of open stores to which you are assigned with shortages for the date followed by the word **Short**. The shortage count appears below the overage count. If no stores are found the count will be 0 Over or 0 Short.
6. If there are open stores to which you are assigned for dates beyond the initial five days (open days before today minus 5), the count of open stores to which you are assigned are labelled **Older**. The right side displays the word **Over** and the count of open stores to which you are assigned with shortages followed by the word **Short**. The shortage count appears below the overage count. If no stores are found the count will be 0 Over or 0 Short.
 7. For all open stores to which you are assigned is displays in the section labeled **All Days**. It is the count of open stores to which you are assigned for All Days followed by the word **Over** and the count of open stores to which you are assigned with shortages for All Days followed by the word **Short**. The shortage count appears below the overage count. If no stores are found the count will be 0 Over or 0 Short.
 8. You can view more details by tapping **anywhere** inside any of the seven sections. The details for that selection appear.

Store Day Summary - Over/Short (O/S) Sums

The Store Day Summary - Over/Short Store Sums view provides the sums of all overages and all shortages for all open stores on a given day for which the current user is responsible. If all locations to which you are responsible have the same local currency, all monetary values are displayed in the local currency. Otherwise, all monetary values are displayed in the retailer's primary currency. If the Over/Short value for the store day is a positive value it is considered an overage; if the Over/Short value for the store day is a negative value it is a shortage.

To view the Store Day Summary - Over/Short Sums:

1. From the Sales Audit Task list, tap **Store Day Summary**. The Store Day Summary - Open Store Days screen appears.
2. Tap the **Open Store Days** to view the four available Store Day Summary views.

Figure 4-4 Store Day Summary Options List

ORACLE® Store Day Summary Store Day Summary	
Open Store Days ✓ Open Store Days O/S Store Days O/S Store Sums Error Count 2 Open 3 Open 0 Open 3 Open 0 Open 20 Open 28 Open	
6/27/19 Thursday 0 Open	
6/26/19 Wednesday 3 Open	
6/25/19 Tuesday 0 Open	
Older 20 Open	
All Days 28 Open	

- Tap **O/S Store Sums**. The screen refreshes and shows the Store Day Summary for O/S Store Sums.

Figure 4-5 O/S Store Sums

ORACLE		
Store Day Summary X 1311 X 1331 X		
O/S Store Sums ?		
Short Over		
6/28/19 Friday		
		0.00 USD
		0.00 USD
6/27/19 Thursday		
		1,000.00 USD
		199.45 USD
6/26/19 Wednesday		
		410.00 USD
		0.00 USD
6/25/19 Tuesday		
		0.00 USD
		805.50 USD
6/24/19 Monday		
		0.00 USD
		0.00 USD
Older		
		0.00 USD
		0.00 USD
All Days		
		1,410.00 USD
		1,004.95 USD

- There are seven sections displayed in this view. The first five sections contain the five most recent days, starting with yesterday (today's date minus 1); each containing the sum of overages for open stores and the sum of shortages for open stores.

- The first five sections contain the five most recent days, starting with yesterday (today's date minus 1), each containing the sum of overages for open stores and the sum of shortages for open stores.
 - The date is displayed on the left side of the section with the day of the week displayed below it. The five dates displayed are today minus 1 through today minus 5.
 - The right hand section contains the sum of the over and shortages, together with their values in the local or retailer's default currency. The short value is preceded with a -. If no stores are found with an over or short value, a zero value is displayed rather than leaving the section blank. The over and short total values are represented in the local or the retailers primary currency.
 - The left portion of the bar represents shortages and the right portion of the negative stack bar represents overages. The red/blue for shortages/overages respectively is the percentage representation of the shortage/overage value for open stores for a specific day, assuming the width of each halves of the stack bar represents all possible open stores to which one is assigned.
5. The **Older** section displays the sums of overages and shortages of open stores prior to the first five dates. If no overages or shortages are found, the section will still display with a sum of zero rather than leaving it blank.
 6. A sum of all overages and shortages for all open stores to which you are assigned is displayed in the section labeled **All Days**.
 7. You can view more details by tapping **anywhere** inside any of the seven sections. The details for that selection appear.

Store Day Summary - Error Count

The Store Day Summary - Error Count view shows the number of outstanding errors on the specified days for stores for which the current user is responsible. An outstanding error is defined as an error that exists against a store day that has not been overridden.

To view the Store Day Summary - Error Count:

1. From the Sales Audit Task list, tap **Store Day Summary**. The Store Day Summary - Open Store Days screen appears.
2. Tap the **Open Store Days** to view the four available Store Day Summary views.

Figure 4-6 Store Day Summary Options List

The screenshot shows the Oracle Store Day Summary application interface. At the top, there is a header bar with the Oracle logo and a menu icon. Below the header, there are two tabs labeled 'Store Day Summary'. A dropdown menu is open, showing the following options:

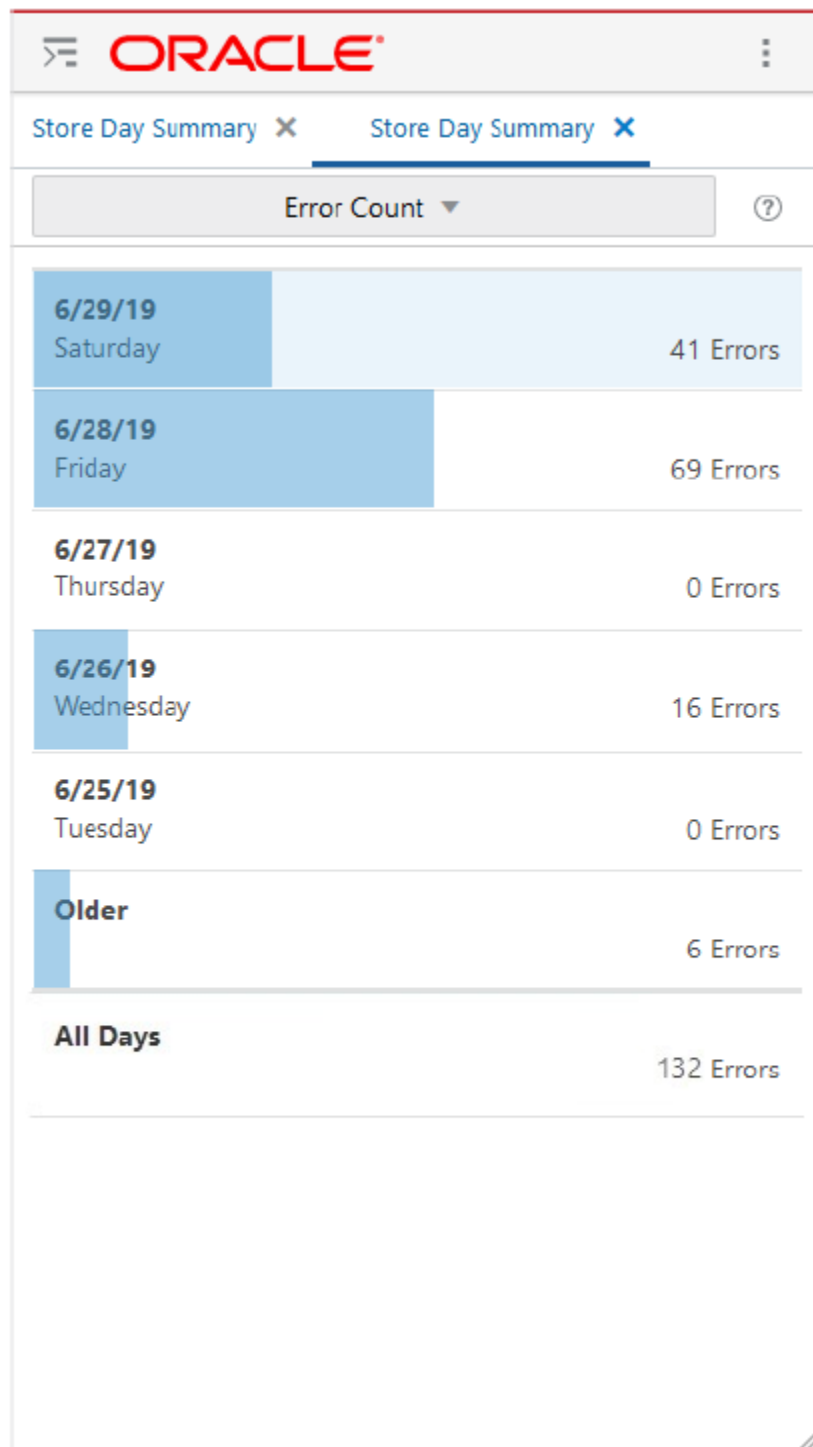
- ✓ Open Store Days
- O/S Store Days
- O/S Store Sums
- Error Count

The main content area displays a list of store days with their corresponding open status:

Store Day	Open Status
6/27/19 Thursday	0 Open
6/26/19 Wednesday	3 Open
6/25/19 Tuesday	0 Open
Older	20 Open
All Days	28 Open

3. Tap **Error Count**. The screen refreshes and shows the Store Day Summary for Error Count.

Figure 4-7 Error Count



4. There are seven sections displayed in the Store Day Summary - Error Count view.
 - The first five sections contain the most recent days, starting with yesterday (today's date minus 1), each containing the number of outstanding errors.
 - The date is displayed on the left side of the section with the day of the week displayed below it. The five dates displayed are today minus 1 through today minus 5.

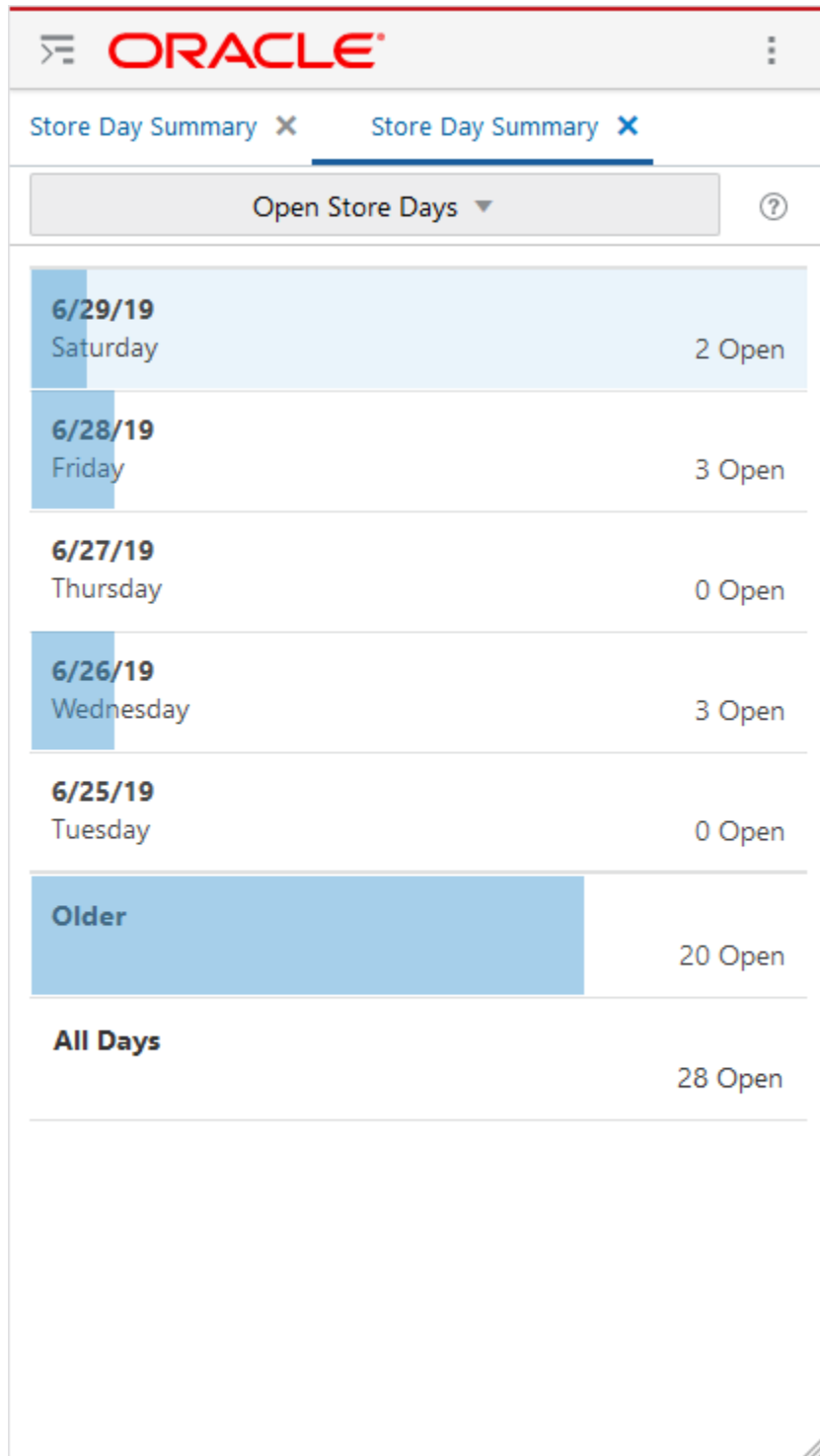
- The right side of the section contains the count of outstanding errors for the date, followed by the word Errors. If no outstanding errors are found the count will be 0 Errors.
 - A visual representation of the error count is displayed in each section except for the All Days section. A blue bar representing the number of errors fills each section. Assuming the width of the screen represents all outstanding errors, the percentage of outstanding errors for the specified date out of the total outstanding errors for all open store days is used to fill the same percentage of the section. If there are 100 errors and 50 of the errors occurred against stores on the specified day, then 50% of the section will be blue, the bar extends exactly halfway across the screen.
5. The **Older** section displays the counts of outstanding errors for store days which you are assigned prior to the first five dates.
 6. A total count of outstanding errors for all store days is displayed in the section labeled **All Days**.
 7. You can view more details by tapping **anywhere** inside any of the seven sections. The details for that selection appear.

Store Day Summary Detail

To view Store Day Summary Detail:

1. Navigate to the Store Day Summary. See [Getting Started](#) for details.

Figure 4-8 Open Store Days



The screenshot shows the Oracle Store Day Summary Detail screen. At the top is the Oracle logo. Below it are two tabs, both labeled 'Store Day Summary'. A dropdown menu is set to 'Open Store Days'. The main content area displays a list of dates and the number of open stores for each. The dates are 6/29/19 (Saturday, 2 Open), 6/28/19 (Friday, 3 Open), 6/27/19 (Thursday, 0 Open), 6/26/19 (Wednesday, 3 Open), 6/25/19 (Tuesday, 0 Open), Older (20 Open), and All Days (28 Open). The 'Older' and 'All Days' sections are highlighted with a blue background.

Date	Day	Open Stores
6/29/19	Saturday	2 Open
6/28/19	Friday	3 Open
6/27/19	Thursday	0 Open
6/26/19	Wednesday	3 Open
6/25/19	Tuesday	0 Open
Older		20 Open
All Days		28 Open

2. Tap **inside** any of the seven available sections to see the list of stores for that date or for the Older/All Days section.

Figure 4-9 Store Day Summary Detail

 ORACLE 	
Store Day Summary 	
 Back	6/26/19 
Charlotte * 1111 Auditor RESA_ADMIN,RMS_ADMIN Over/Short 0.00 AUD	
Data  Errors 6	
Chicago* 1311 Auditor RESA_ADMIN,RMS_ADMIN Over/Short 0.00 USD	
Data  Errors 10	
Minneapolis 1331 Auditor RESA_ADMIN,RMS_ADMIN Over/Short 0.00 USD	
Data  Errors 0	

3. To return to the previous screen, tap **Back**. The Store Day Summary dashboard appears.

5

Store Detail

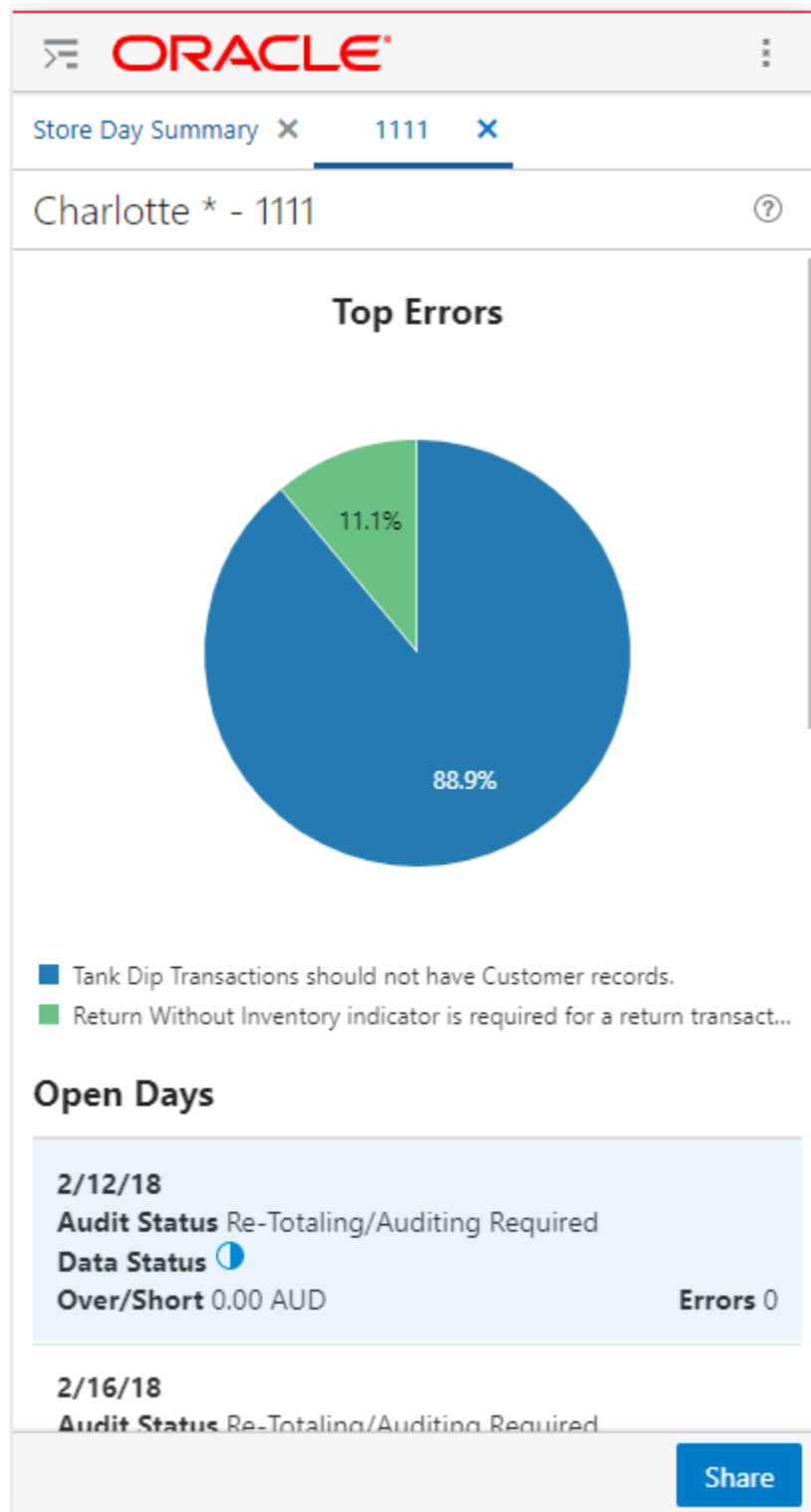
This section contains the following information about the Store Detail screen:

- [Store Detail](#)
- [Sending an Email](#)
- [Sending a Text Message](#)

Store Detail

The Store Detail screen displays a chart showing the top errors that occurred against the open days for the selected store, along with a list showing summary information for each of the open business days. When the user clicks on one of the Open Days in the Open Days list, the Store Day screen opens to show more detailed information about that open day for the current store.

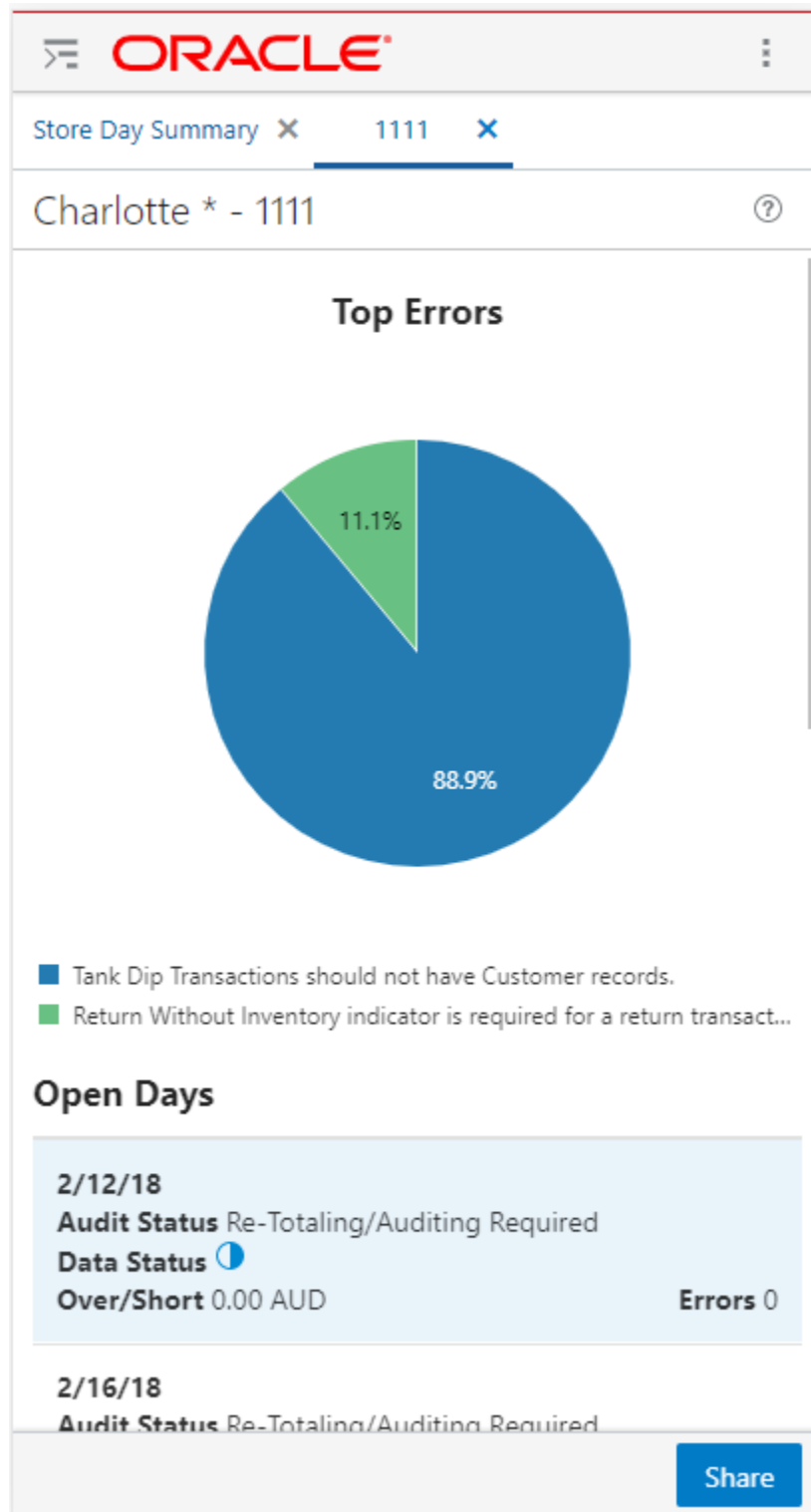
Figure 5-1 Store Detail Screen



Sending an Email

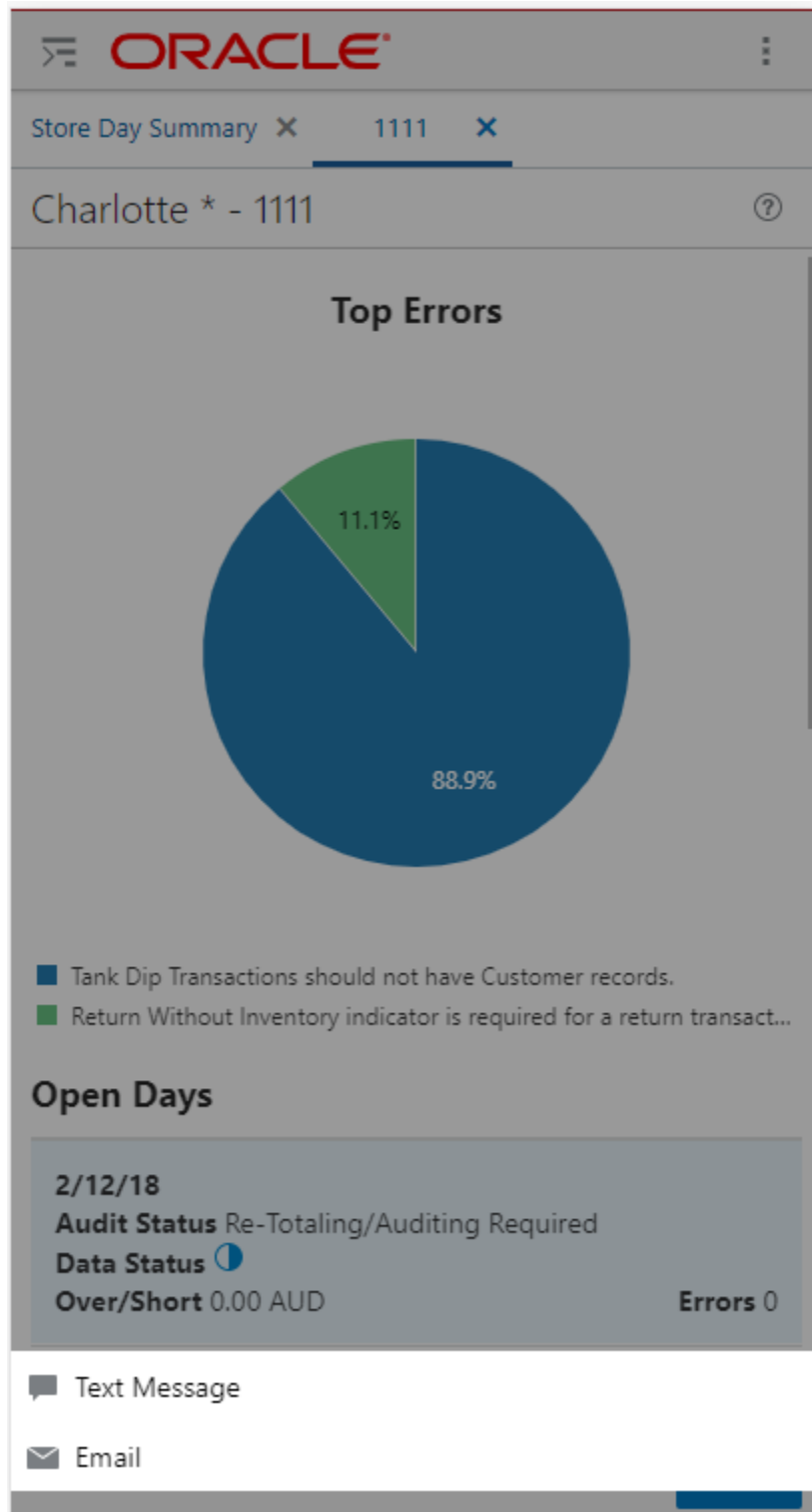
To send an email:

Figure 5-2 Store Detail Screen



1. From the Store Detail screen, tap **Share** to see the available options.

Figure 5-3 Share Options



2. Tap **Email**.
3. The subject of the email is displayed. This field is system generated and user editable. The following details are displayed:
 - Store/Business date

- Store Name
 - Store ID
 - Chain Name
 - O/S Value
 - Errors
 - Message containing Open in the desktop app followed by a hyperlink/URL
4. You can add additional comments prior to sending the email.

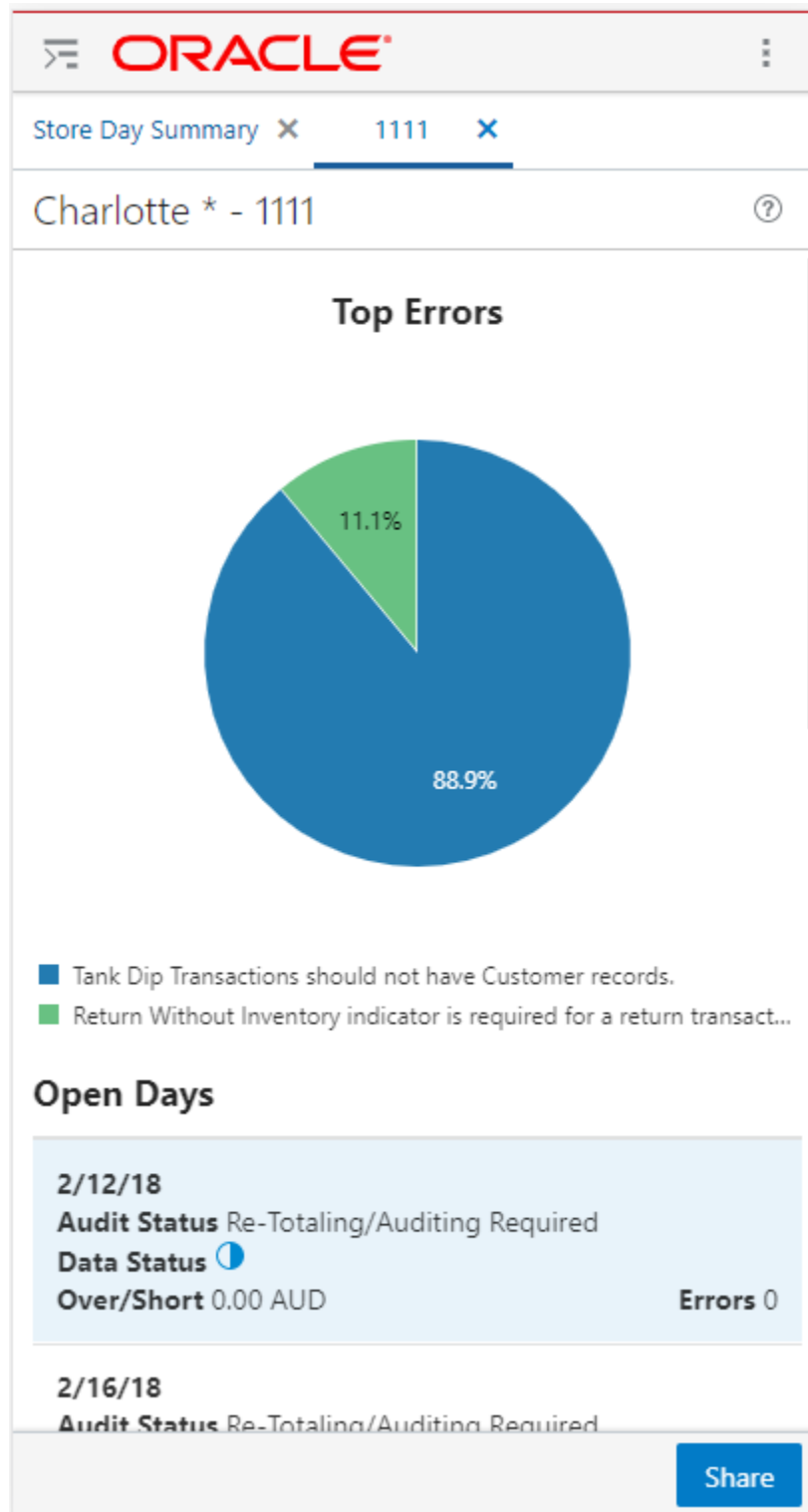
 Note:

Copying and pasting the URL included in the email into a browser, enables the recipient to launch directly into the Sales Audit desktop application to the Store Day Summary screen for the specific store day.

Sending a Text Message

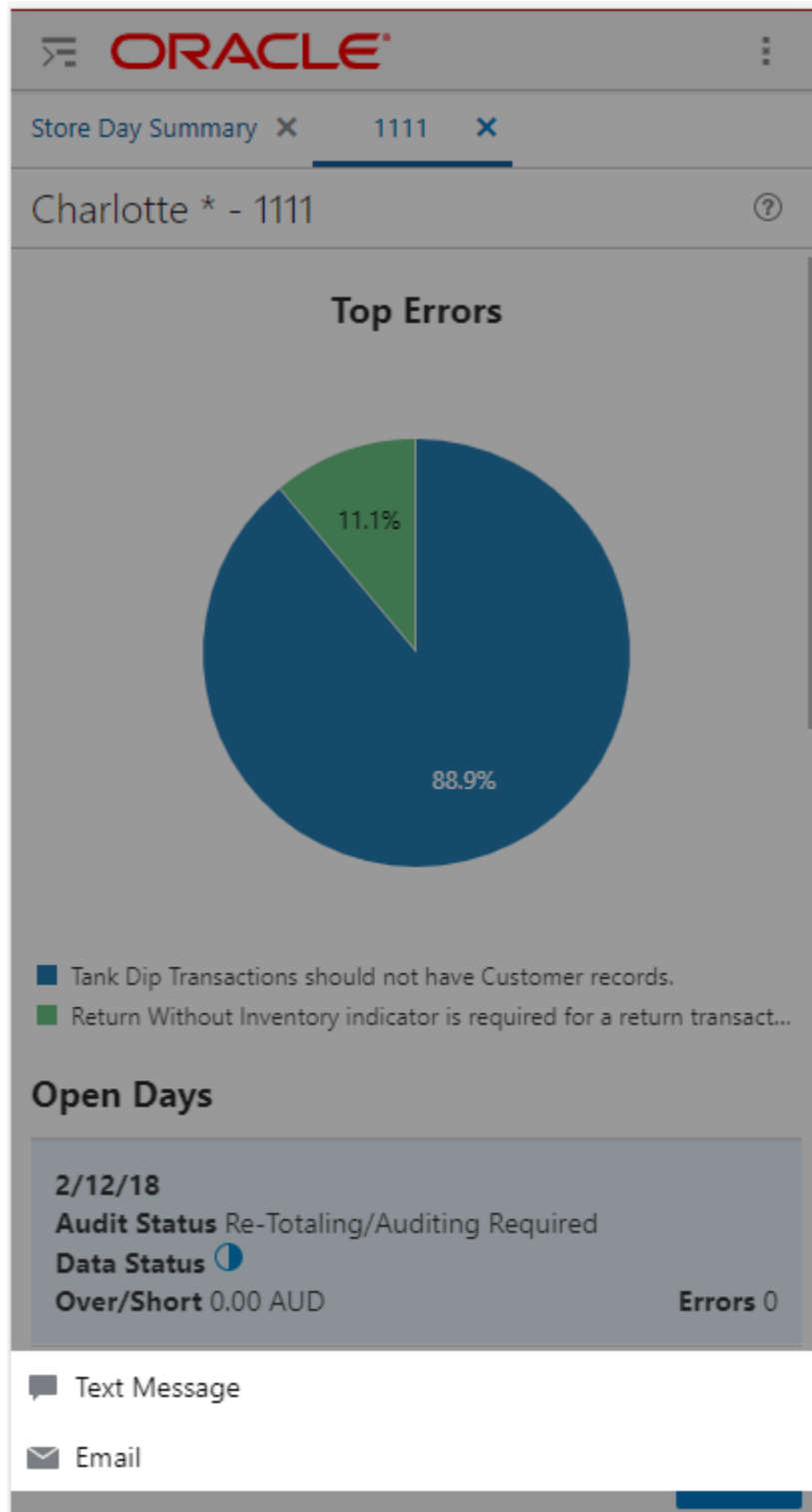
To send a text message:

Figure 5-4 Store Details Screen



1. From the Store Details screen, tap **Share** to see the available options.

Figure 5-5 Share Options



2. Tap **Text**.
3. A text message appears. This field is system generated and user editable. The following details are displayed:
 - Store/Business date

- Store Name
 - Store ID
 - Chain Name
 - O/S Value
 - Errors
 - Message containing Open in the desktop app followed by a hyperlink/URL
4. You can add additional comments prior to sending the text message.

6

Store Day

The Store Day screen displays details about a specific store day. This screen is accessed from the Store Day Summary screen when a single business date is selected, or from the Store Detail screen.

Figure 6-1 Store Day

ORACLE®	
Store Day Summary X	1311 X 1331 X
Chicago* - 1311 ?	
Business Date	6/28/19
Audit Status	Re-Totaling/Auditing Required
Audit Changed	6/28/19 11:00:00 PM
Data Status	●
Over/Short	0.00 USD
Errors	41
Transactions	26
Files Loaded	37

Store Day

The Store Day screen displays the following information:

- Store Name/ID
- Business Date
- Audit Status
 - Unaudited
 - Errors Pending
 - Re-Totalling/Auditing Required
 - Totaled
 - Audited
- Audit Changed
- Data Status - Visual representation of the current status include:
 - Ready for Import - Empty circle
 - Loading - Half full circle
 - Partially Loaded - Half full circle
 - Fully Loaded - Full circle
 - Stored days in Purged status will not be displayed
- Over/Short - The Over/Short value for the store day with the currency code displayed next to the value. If the value is short a negative sign will show before the value.
- Errors - The number of outstanding errors for the store day.
- Transactions - The number of transactions that exist for the store day.
- Files Loaded - The number of files that have been loaded for the store day.

7

Store Search

Selecting Store Search from the drawer menu will display the Store Search screen. The Store Search screen allows users to search for specific stores using basic criteria. Users have the ability to search for all stores to which they have access based on RMS Location Data Security, which match their criteria or only those stores to which they are assigned and match the entered criteria.

Store Search

You can search for a specific open store by entering some basic criteria in the Store Search option.

This section contains the following topics to help you search a store and view store search results:

- [Searching for a Store](#)
- [Viewing Store Search Results](#)

Searching for a Store

To Search for a Store:

1. Tap **Store Search**. The Store Search screen appears.

Figure 7-1 Store Search Screen

ORACLE

Store Search X

Search by Store ID, Name, or Auditor ID

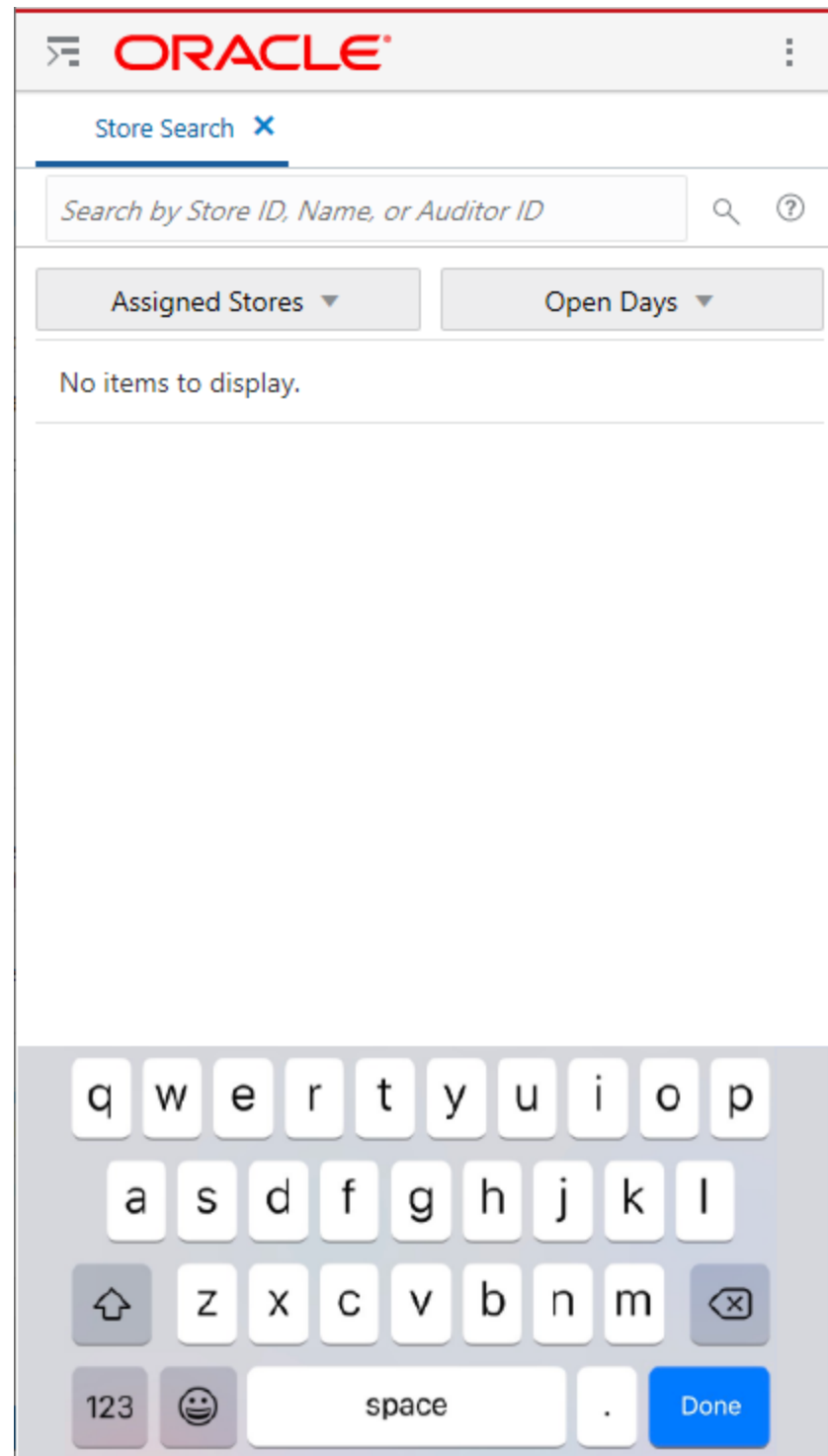
Assigned Stores ▼ Open Days ▼

No items to display.

2. Tap the **Search** box and enter one of the three following items to start a search:
 - Store ID
 - Name
 - Auditor ID

The onscreen keyboard appears.

Figure 7-2 Store Search Screen



 Note:

You must enter one character or more to perform a search.

3. Enter all or part of the **Store ID**, **Name**, or **Auditor ID**. As you type, the list values dynamically change.
4. You can either search for all stores or only those stores to which you are assigned, or can access based on data security defined in Merchandising/Sales Audit. By default, the search results view selectors are set to Assigned Stores and Open Days. See [Figure 7-3](#) and [Figure 7-4](#) to see the list of options for each view selector.

Figure 7-3 View Selector Options List - Assigned Stores



Store Search 



Assigned Stores 

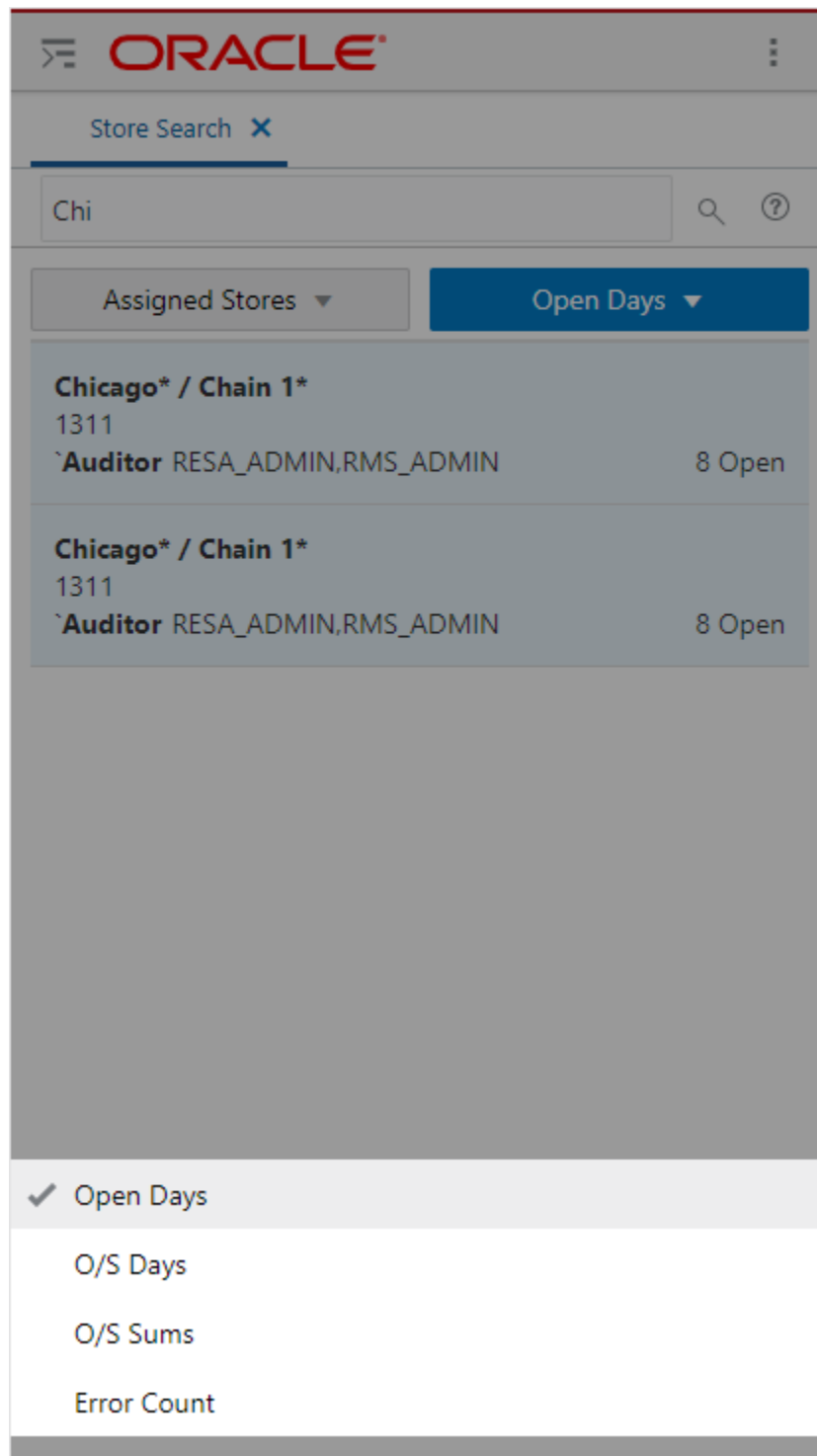
O/S Days 

Charlotte * / Chain 1* 1111 `Auditor RESA_ADMIN,RMS_ADMIN	0 Over 0 Short
Chicago* / Chain 1* 1311 `Auditor RESA_ADMIN,RMS_ADMIN	0 Over 0 Short
Chicago* / Chain 1* 1311 `Auditor RESA_ADMIN,RMS_ADMIN	0 Over 0 Short

 Assigned Stores

All Stores

Figure 7-4 View Selector Options List - Open Days



Viewing Store Search Results

There are many options on how to view Store Search results:

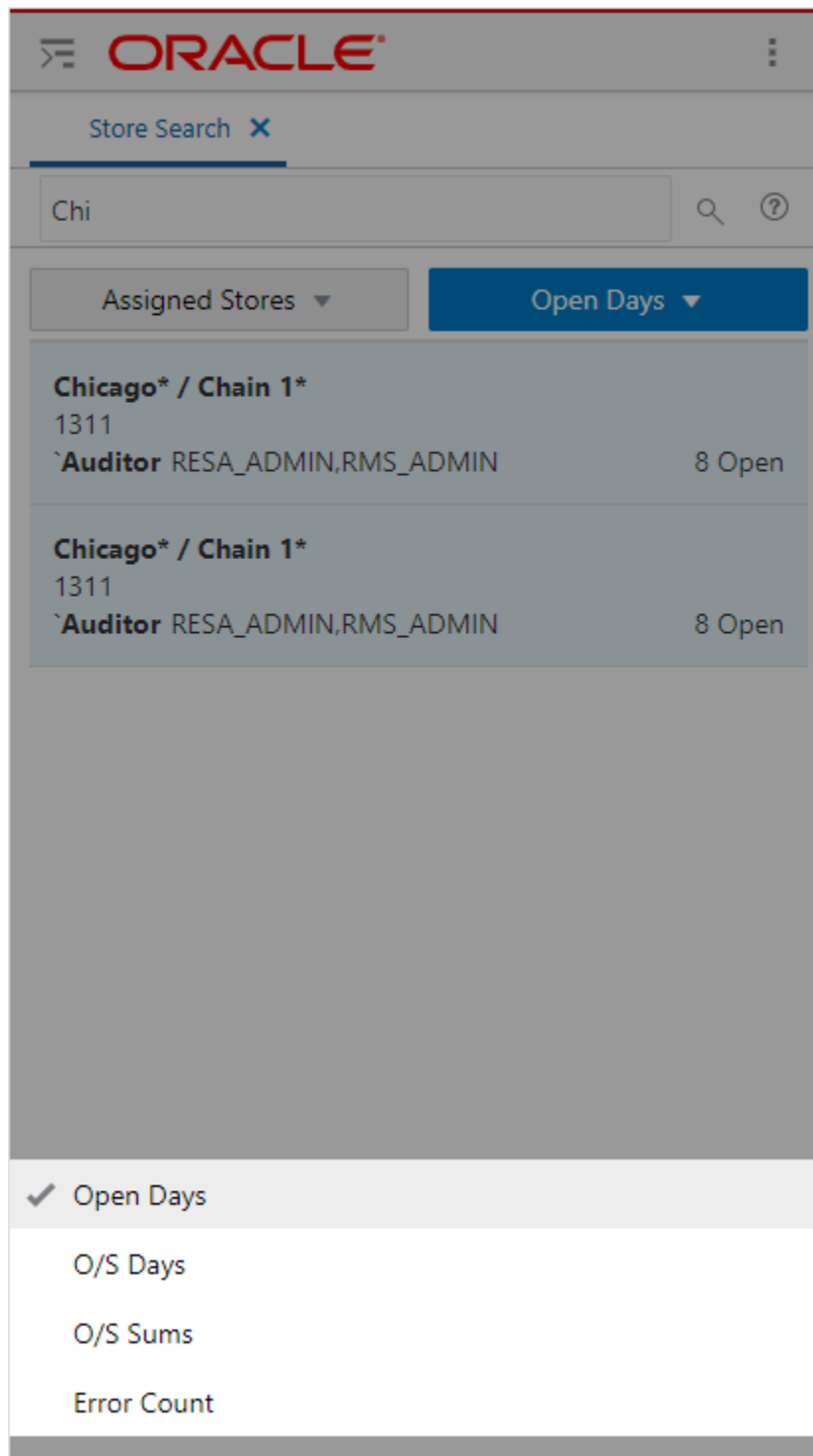
Figure 7-5 Store Search Results Screen

The screenshot displays the Oracle Store Search interface. At the top, the Oracle logo is visible. Below it, a search bar contains the text 'Ch'. To the right of the search bar are icons for search and help. Below the search bar, there are two filter buttons: 'Assigned Stores' and 'Open Days'. The search results are listed below the filters. The first result is 'Charlotte * / Chain 1*' with address '1111', auditor 'RESA_ADMIN,RMS_ADMIN', and '12 Open'. The second result is 'Chicago* / Chain 1*' with address '1311', auditor 'RESA_ADMIN,RMS_ADMIN', and '8 Open'.

Store Name	Address	Auditor	Open Days
Charlotte * / Chain 1*	1111	RESA_ADMIN,RMS_ADMIN	12 Open
Chicago* / Chain 1*	1311	RESA_ADMIN,RMS_ADMIN	8 Open

1. You can either tap the **Open Days View Selector** to cycle through the four available Store Day Summary views. The following dialog appears:

Figure 7-6 Store Day Summary View Options



- The store name, store ID, and the auditor's application user ID is displayed.
- The store's associated value depending on the view selected is displayed.

2. You can view more details by tapping one of the **Stores** in the list. The Store Detail screen appears.

Figure 7-7 Store Detail

