# Oracle® Retail Merchandising Foundation Cloud Service

## Recent Transfers Mobile User Guide

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Oracle Retail Merchandising Foundation Cloud Service Recent Transfers Mobile User Guide, Release 24.0.101.0

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- Did you find any errors in the information?
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# 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.

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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 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.

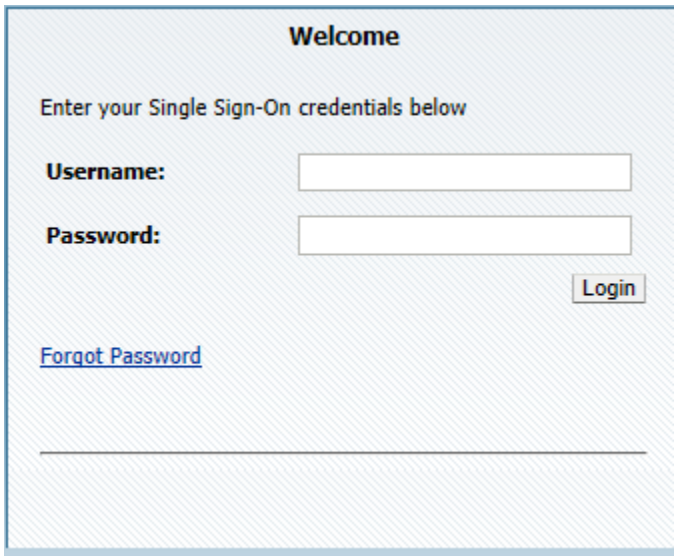
For more details on security privileges and the access granted by each, refer to the *Oracle Retail Merchandising Security Guide*.

## Accessing the Recent Transfers Workflow

To access the Recent Transfers workflow:

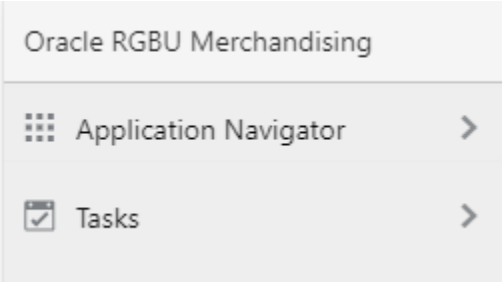
1. **Login** to the application.

**Figure 2-1 Login Screen**



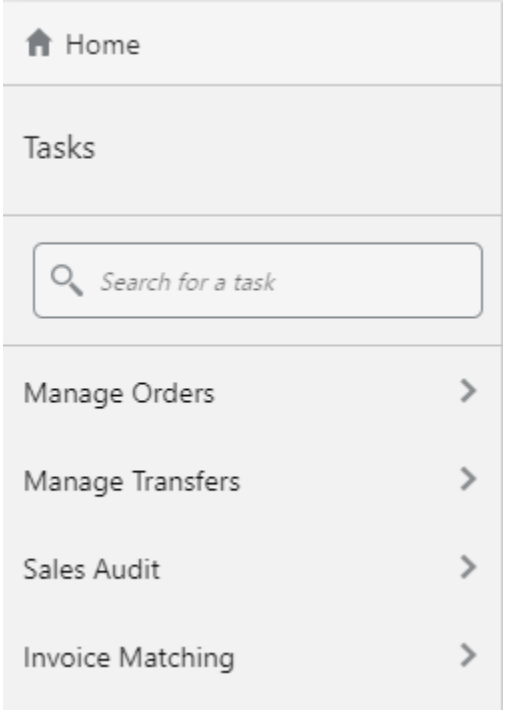

2. Tap the **Menu** icon. The Merchandising options appear.

**Figure 2-2 Merchandising Options**



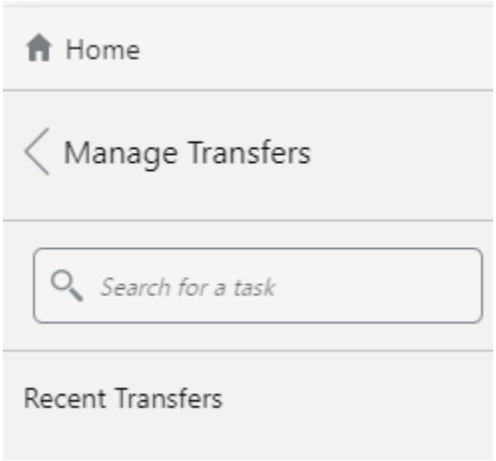

3. Tap **Tasks**. The Task Options appear.

**Figure 2-3 Task Options**



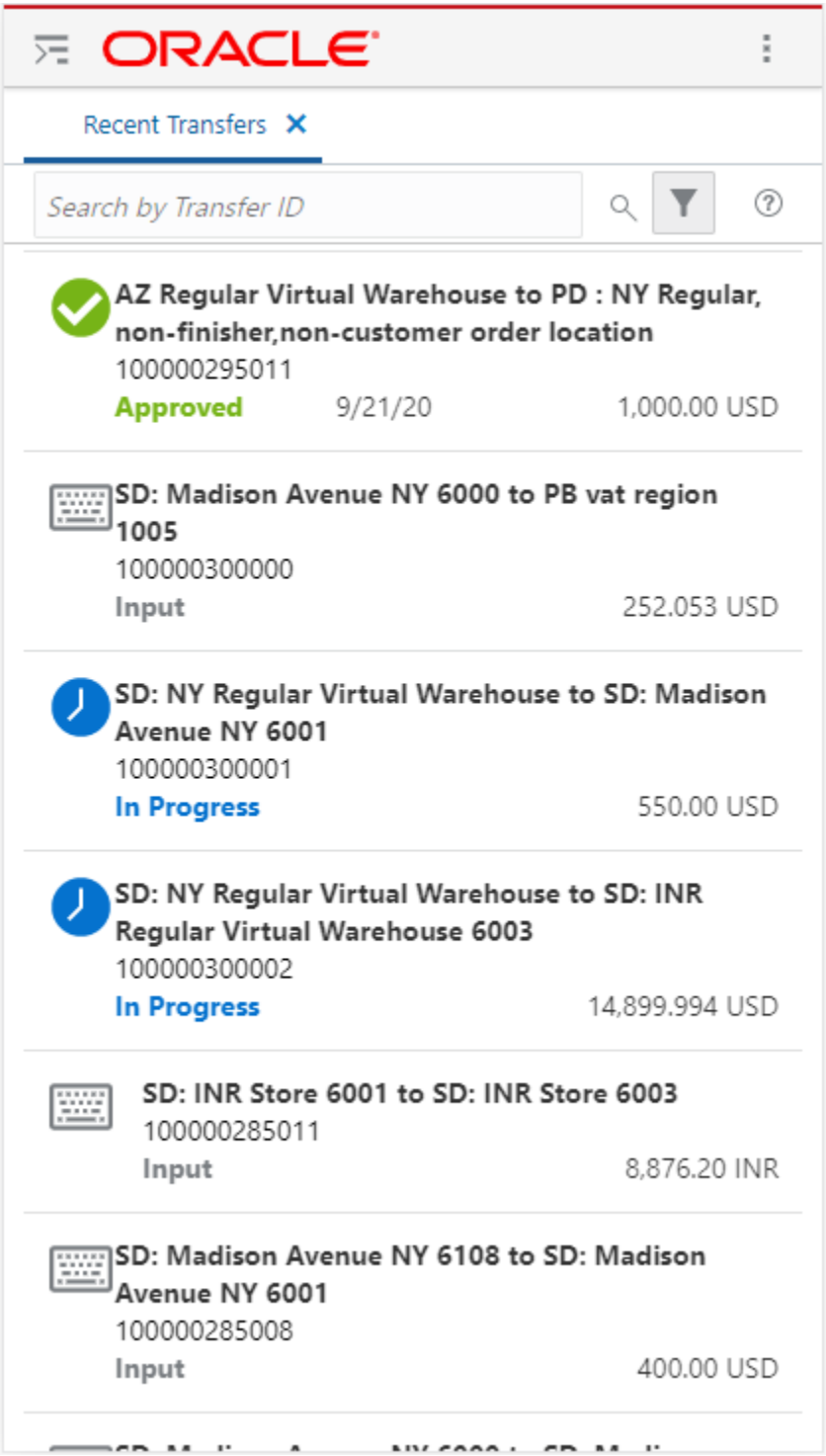

4. Tap **Manage Transfers**. The Recent Transfers option appears.

**Figure 2-4 Manage Transfers Menu Option**




5. Tap **Recent Transfers**. The initial Recent Transfers criteria screen appears.

**Figure 2-5 Recent Transfers Screen**

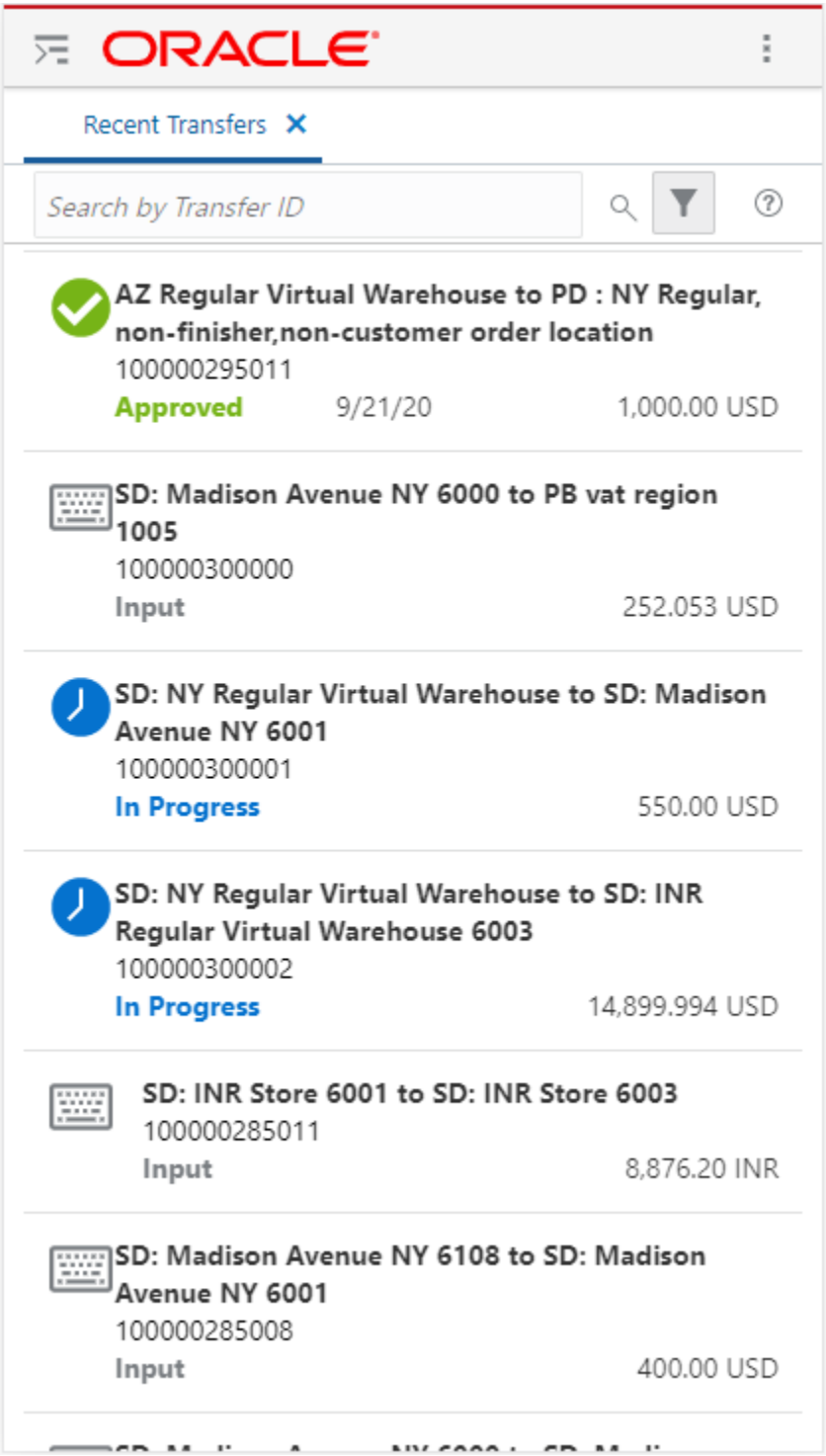


# 3
# Recent Transfers

## 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. |

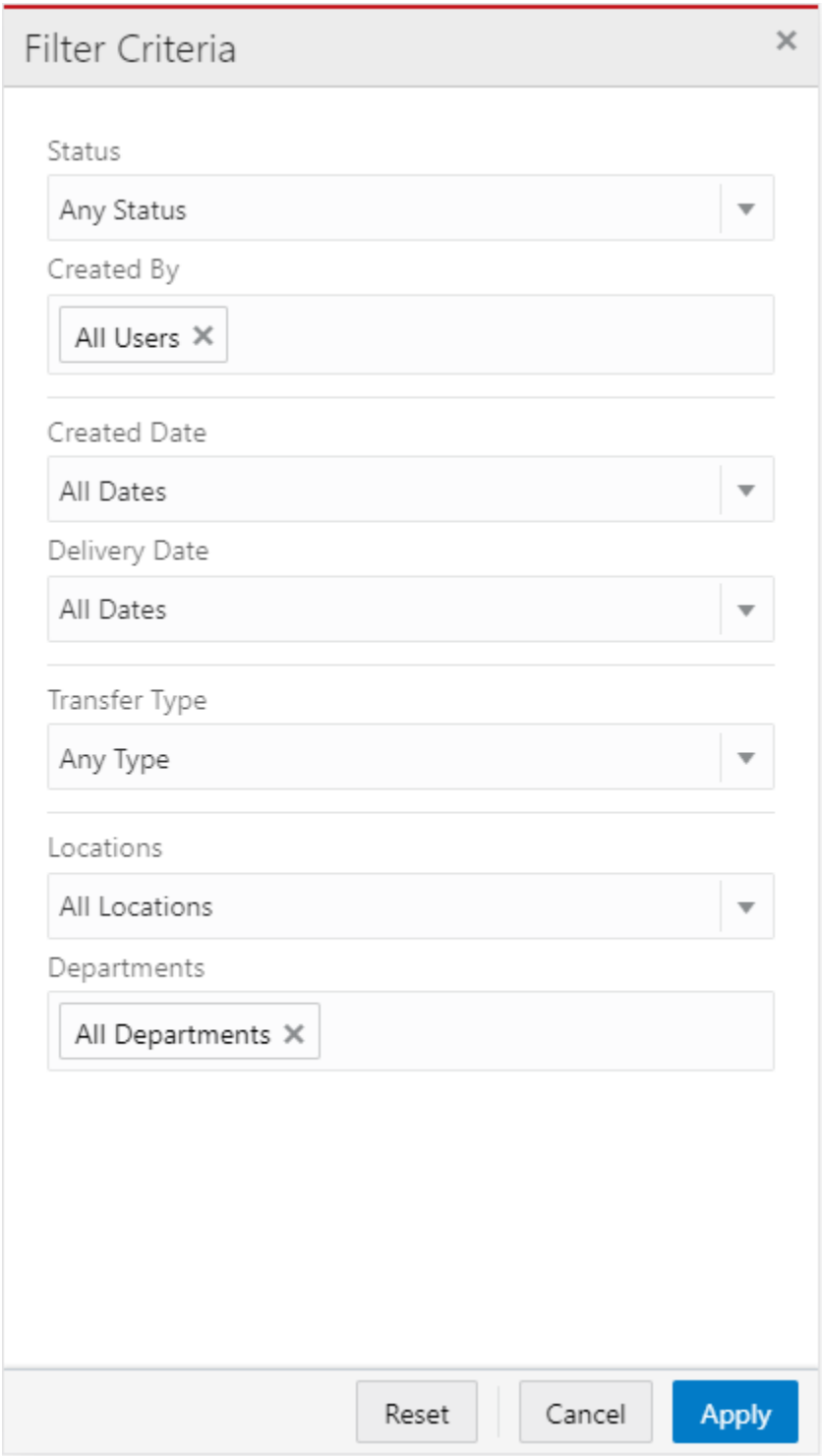
| Field | Description |
|---|---|
| Transfer ID | The ID of the Transfer. |
| Status | The description of the status of the transfer:<br>• Input<br>• Submitted<br>• Approved<br>• In Progress<br>• Closed |
| Total Cost | The total cost of the transfer based on the from location currency.<br>Example: 10,000.00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

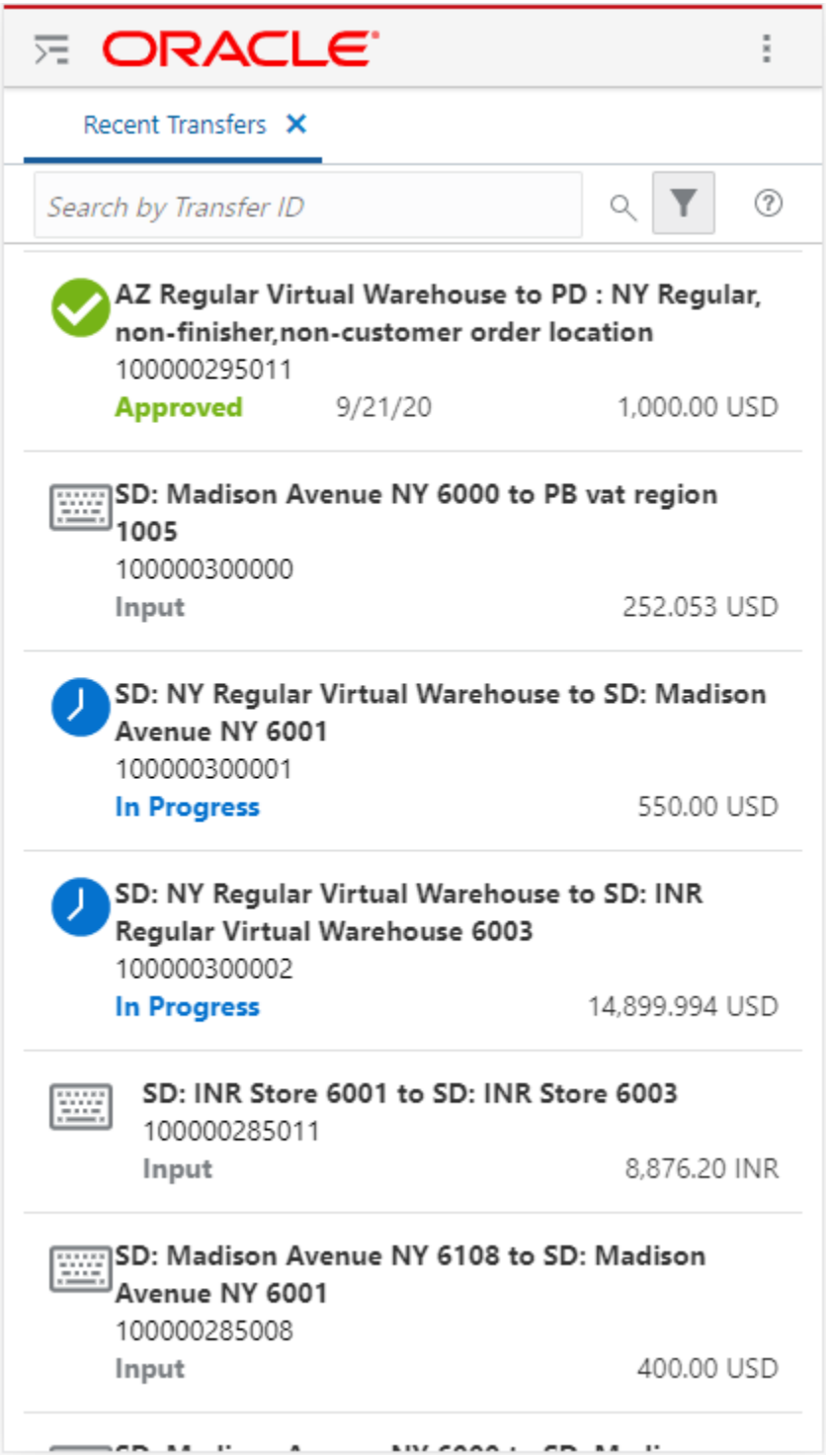
**Figure 3-2 Recent Transfers Filter Criteria Screen**



| 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.<br>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:

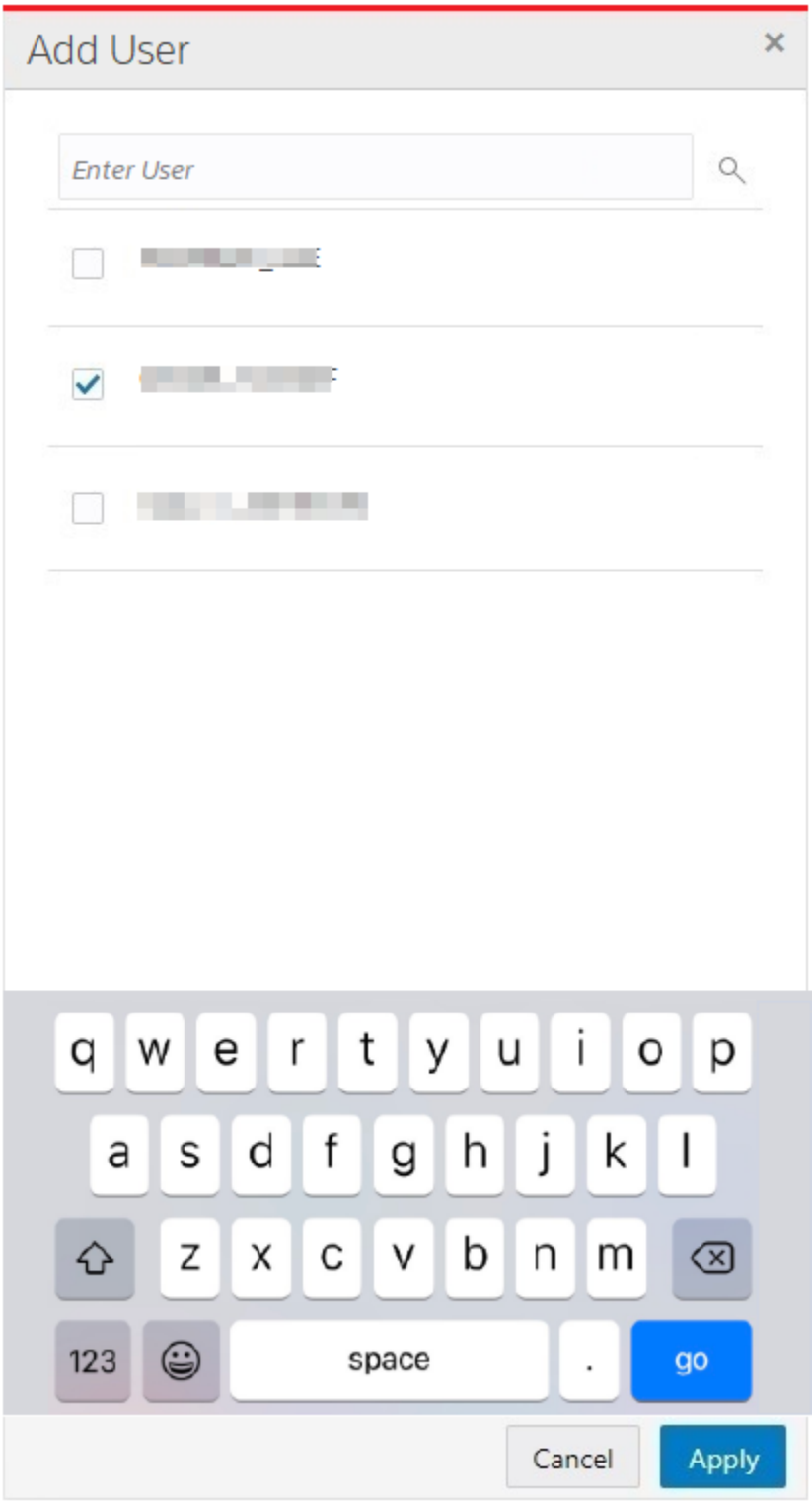
- All Users X icon.
- All Departments X icon.

> **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**

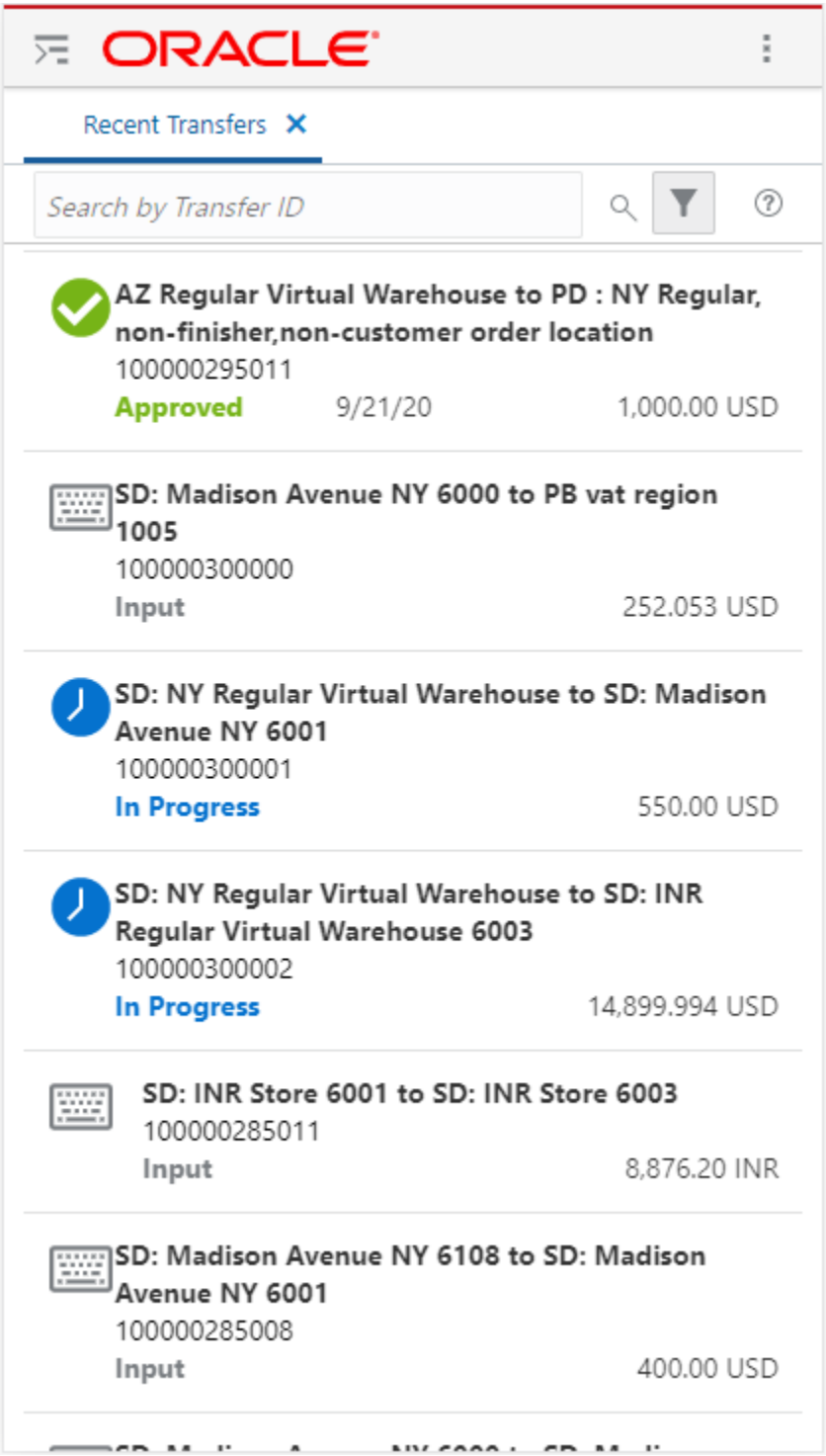



3. Enter all or part of a user name. As you type, the list of names dynamically change.
4. Check the box for the desired name.

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**



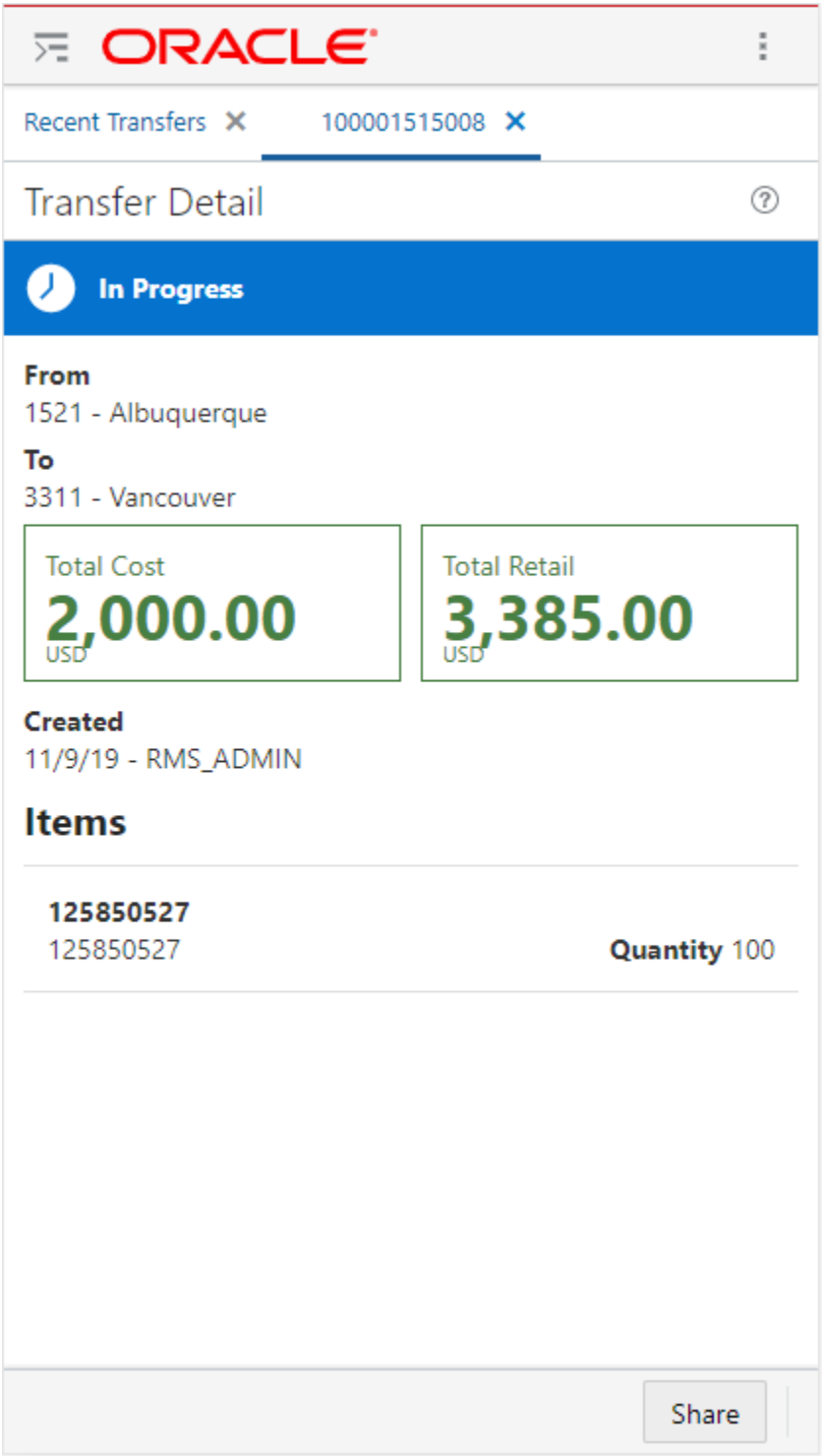

Search by Transfer ID: Enter all or part of a Transfer ID in the Search by Transfer ID field. The Transfer IDs dynamically update as you type in the value.

# 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:<br>• Input<br>• Submitted<br>• Approved<br>• In Progress<br>• 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.<br>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.<br>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.<br>The Reject button, if enabled, allows you to reject the Transfer. Applies only to transfers in Submitted status.<br>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

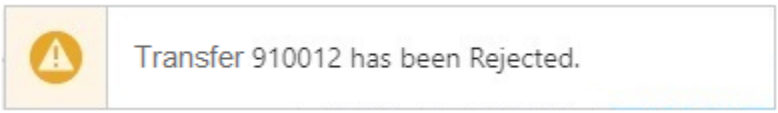
1. To approve a transfer, tap **Approve**. A notification appears confirming the approval.

**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**

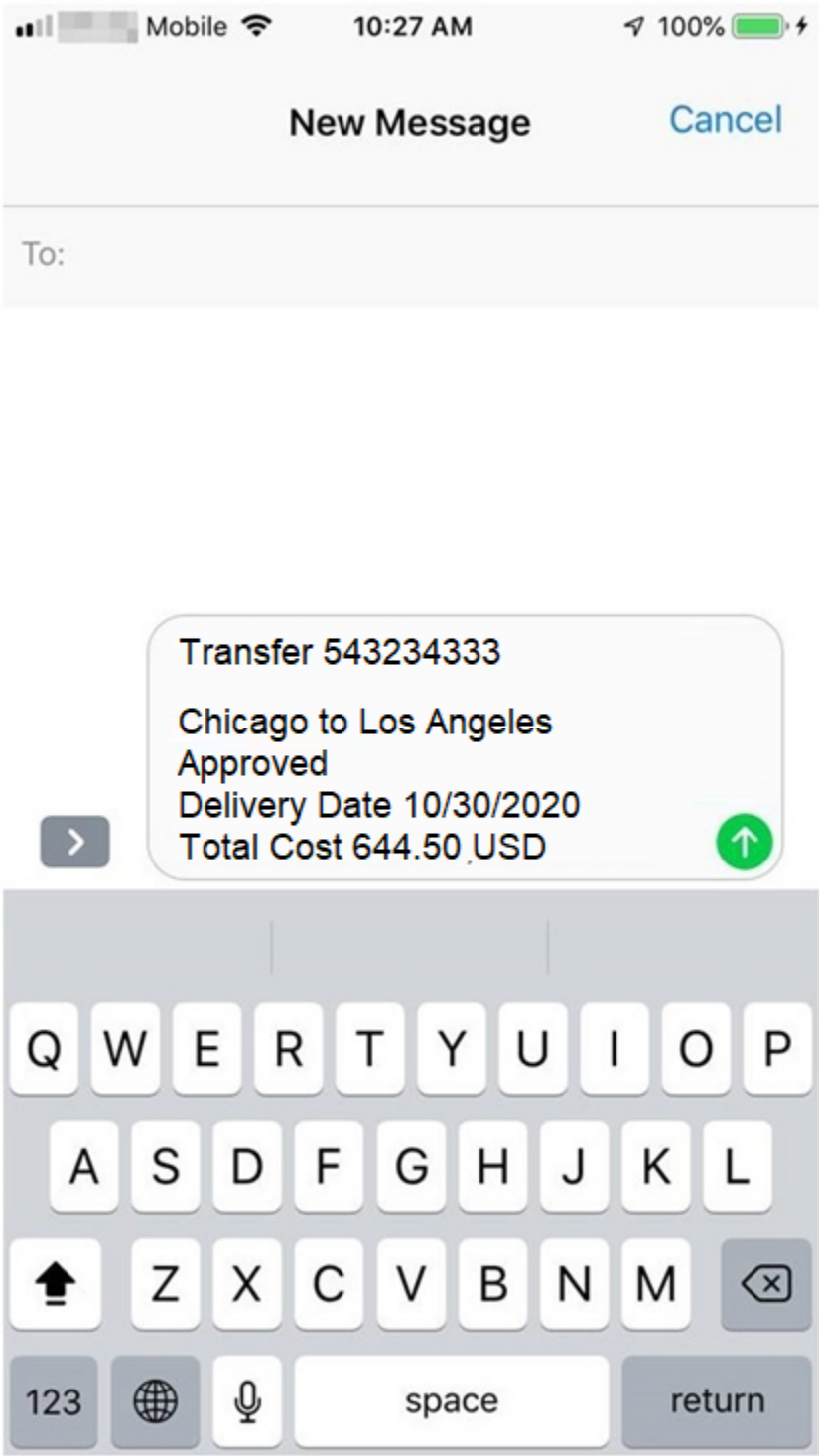



# Share a Transfer

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**.