

Oracle® Retail Merchandising Foundation Cloud Service

Do the Basics User Guide



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Preface

This document describes the Oracle Retail Merchandising 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. This includes merchandisers, buyers, business analysts, and administrative personnel.

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- 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

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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.
<i>italic</i>	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

Do the Basics

A series of new screens have been introduced that use the Oracle Redwood user experience design patterns. These screens are part of a new Locations Destination that has a unique set of interface options and controls that vary from the classic interface of the Oracle Retail Merchandising Suite of solutions. The following sections describe the Locations Destination user interface controls in more detail.

You can quickly access the tasks of the Locations Destination from the Home Experience, which can be opened by clicking the Oracle icon, also referred to as the 'O-tag' in the bottom right corner of the screen. See [Home Experience](#) for more information on how to access and use the home experience features.

The following topics are covered in this chapter:

- [Accessing the Locations Destination](#)
- [Accessing the Home Experience](#)
- [Home Experience](#)

Accessing the Locations Destination

The Locations Destination is an extension of the Merchandising solution that is displayed in a separate browser tab from the classic Merchandising interface. The Locations Destination can be accessed once you are logged into Merchandising as long as you have the required security privilege. To access the Locations Destination from Merchandising:

1. From the Tasks menu, select **Foundation Data > Location Foundation > Locations**. The Locations Destination landing page will open in a new browser tab or window.

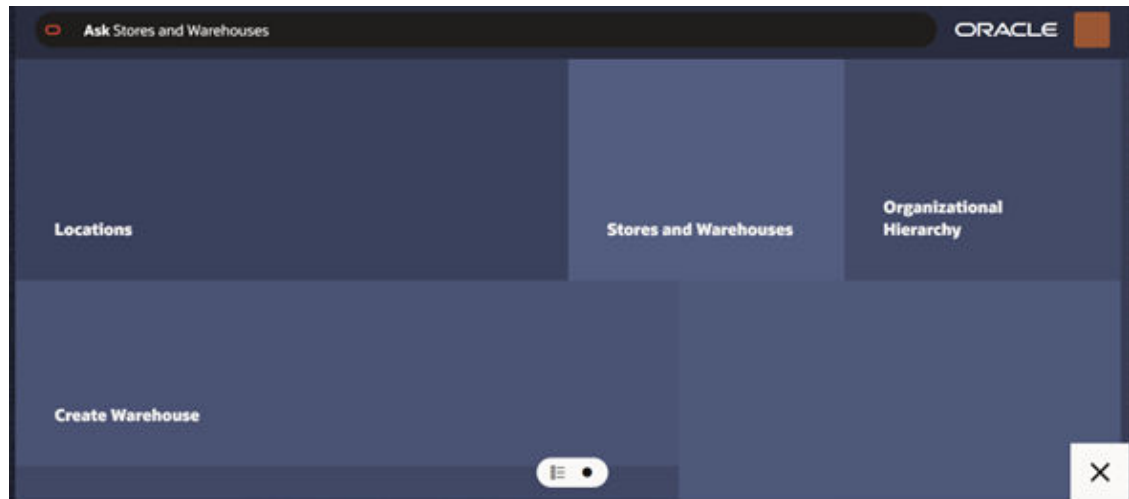
Accessing the Home Experience

The Home Experience is a full-page menu that overlays on top of whatever screen you were previously viewing. It is always accessible from any screen by clicking the Oracle icon, also referred to as the "O-tag", in the bottom right corner. From the Home menu, you can quickly access the tasks available to you in the Locations Destination.

1. Click the Oracle icon, also known as the "O-tag", in the bottom right corner of any the page in the Locations Destination. The Home Experience, which is a full-page menu, will display.

Figure 1-1 The O-tag, Used to Open the Home Experience



Figure 1-2 The Home Experience

Home Experience

The Home Experience is a full-page menu that overlays on top of whatever screen you were previously viewing. It is always accessible from any screen by clicking the Oracle icon, also referred to as the “O-tag”, in the bottom right corner.

The following features are available in the Home Experience:

- Product Map and Suggestions Views
- Ask Oracle Search
- User Menu

Links to all of tasks and actions available to you can be viewed in a **Product Map** display or a **Suggestions** list display, or you can search for a desired task through the **Ask Oracle Search** bar at the top of the Home Experience page.

Your Tasks

The Home Experience is a full-page menu. The tasks and actions available to you are displayed on the screen in one of two views, a **Product Map** view or a **Suggestions** list view.

A task is a link to a task flow to accomplish a business process or procedure. For example, a task may be searching for a warehouse, editing a previously created store, viewing the organizational hierarchy, or creating a store.

You can either click the specific task name to open, or use the **Ask Oracle Search** bar at the top of the Home Experience menu to search for a task flow that you want to open or action you want to perform.

Note

The tasks listed in your Home menu may appear slightly different, depending on features selected during the solution setup process and based on your individual security access. By default, the tasks are displayed in the Product Map view, which may be organized into folders. Clicking the **Suggestions** button toggles to a fully expanded list of all the tasks.

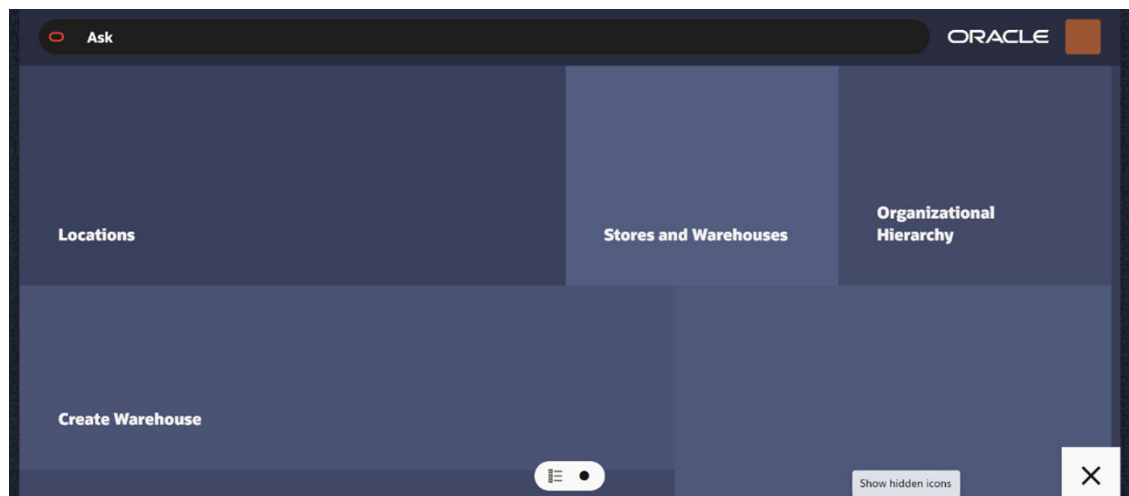
Note

When the Merchandising end-of-day batch jobs are running, the online task flow screens are unavailable. Prior to the batch jobs starting, users are warned to save their work and exit. After a period of approximately five minutes, the batch run starts and users are logged out of the online application. They are not able to access any tasks in the applications until the batch schedule has completed.

Product Map View

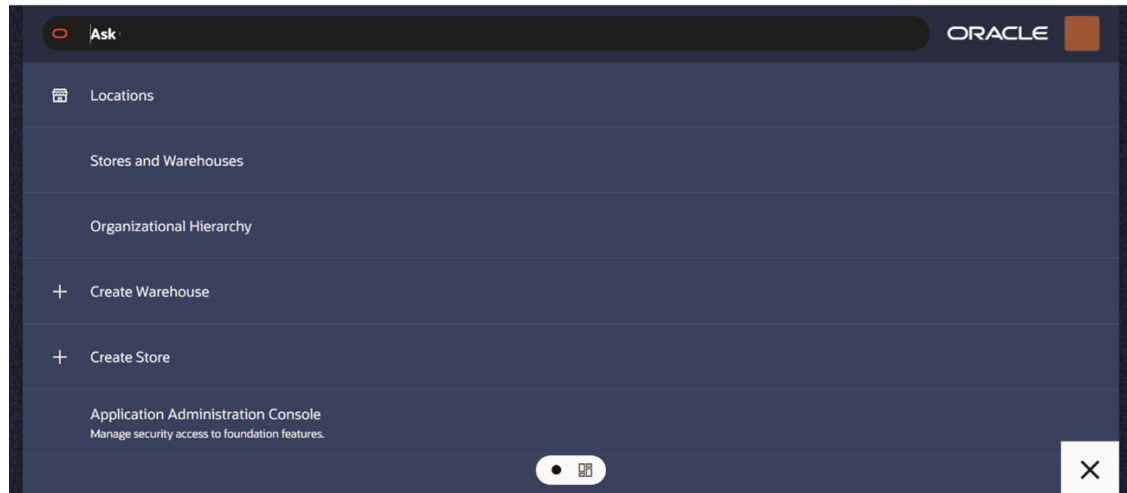
The Product Map view will display the first time you enter the Home Experience. This view offers a high level overview of the tasks and actions available to you, based on your security access. Each box in the Product Map may contain a folder, a link to a task flow, or an action that can be performed in another screen. If the option is a folder, another series of boxes will display in the Product Map, showing the contents of the folder. The folder will contain links to either task flows or actions that can be performed, again displayed based on your security access.

Figure 1-3 Product Map



Suggestions View

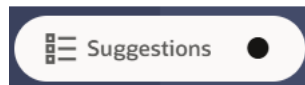
The Suggestions view is a flat listing of the same tasks and actions to which you have access. Each option listed in the Suggestions view is a clickable link to a task flow or action.

Figure 1-4 Suggestions

Toggle Between Views

In the bottom center of the page is a pill-shaped toggle button that allows you to toggle back and forth between this Product Map view and the Suggestions view.

You are currently viewing the Product Map when the button shows a black circle (indicates the currently displayed view) followed by a list icon and the 'Suggestions' label:



Clicking the button when it is in this state toggles the screen to the Suggestions list view. When in the Suggestions view, the button shows a map icon, the 'Product Map' label and then a black circle (indicates the currently displayed view):



Clicking the button when it is in this state toggles the screen to the Product Map view.

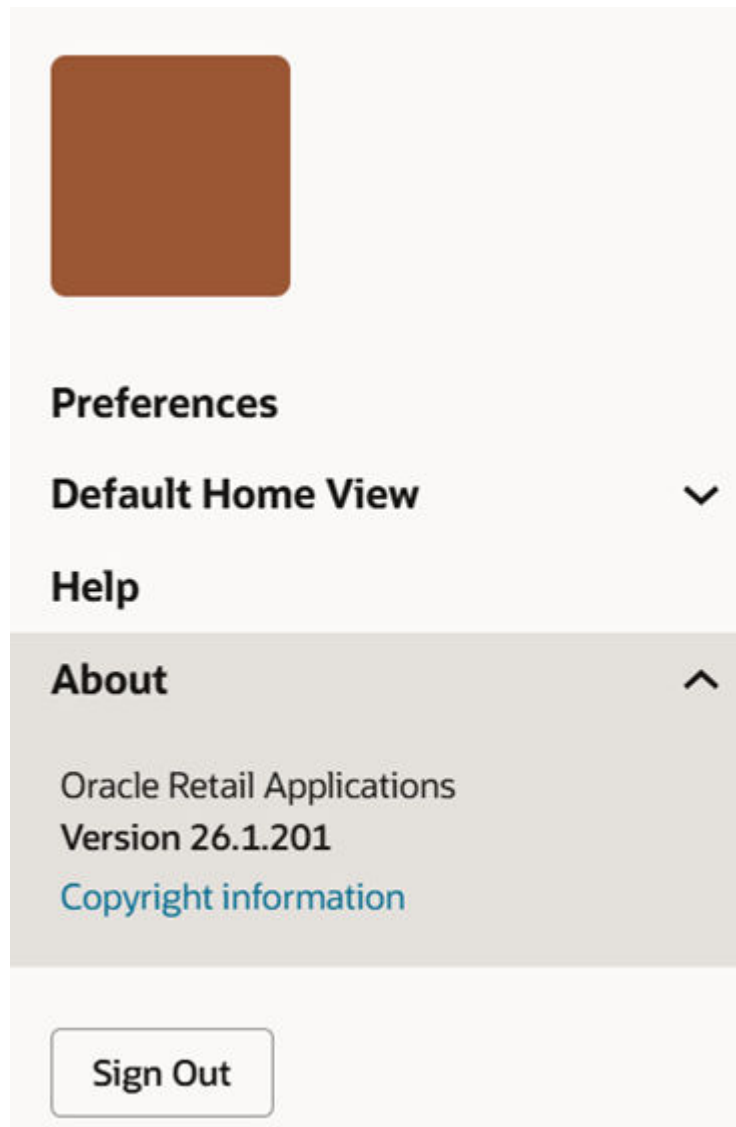
Choose a Default View

From the User Menu you can choose your desired Default Home View, which is a choice between the Product Map or the Suggestions views. It is a way to indicate your preference as to which view is displayed each time you return to the Home Experience. Regardless of which one you select as your default view, you can always toggle to the other view at any time using the toggle button in the bottom center of the Home Experience page.

To switch between the Product Map and Suggestions views:

1. To open the User Menu, in the top right corner of the Home screen, click the square button with your initials.

Figure 1-5 User Menu – Default Home View Section Expanded



2. Click **Default Home View** to expand the section to see the two available options: **Product Map** and **Suggestions**. Initially, the Default Home View will be set to Product Map.
3. Select from the desired view and click anywhere outside of the User Menu to close the User Menu.

Ask Oracle Search

At the top of the Home Experience page is an **Ask Oracle Search** bar. You can use this to find a desired task or action you wish to perform by keying in the part of the name of the task.

Figure 1-6 Home Experience – Ask Oracle Search Bar



As you key in a value, matching tasks will display on the screen. For example, if you were to key in **sto**, any task name that contains the characters 'sto', such as Stores and Warehouses and Create Store, displays with the matching characters displayed in bold font.

Figure 1-7 Home Experience – Ask Oracle Search Results



When you see your desired task, click it to open the associated task flow. Or, if you did not find what you were looking for, you can clear the search bar and try typing another value.

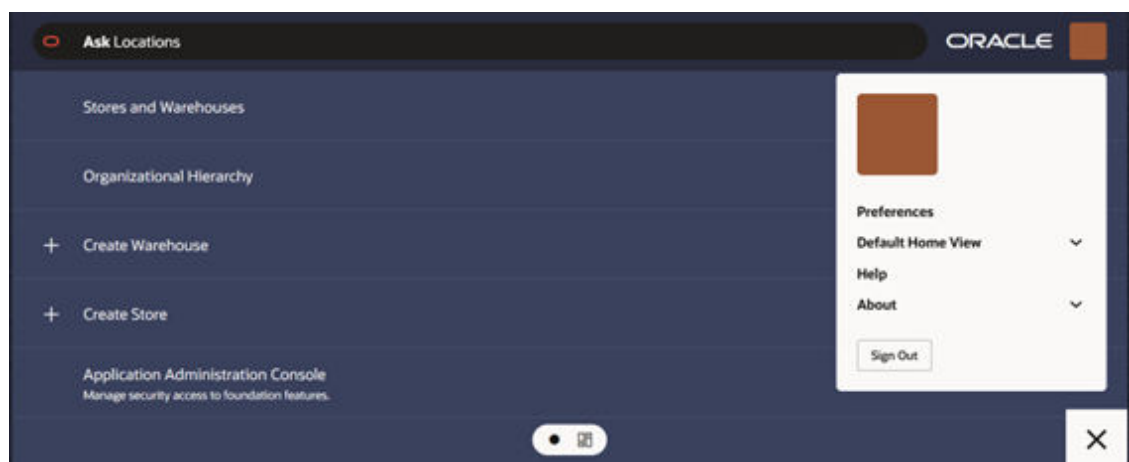
User Menu

The User menu within the Home Experience provides access to several functions:

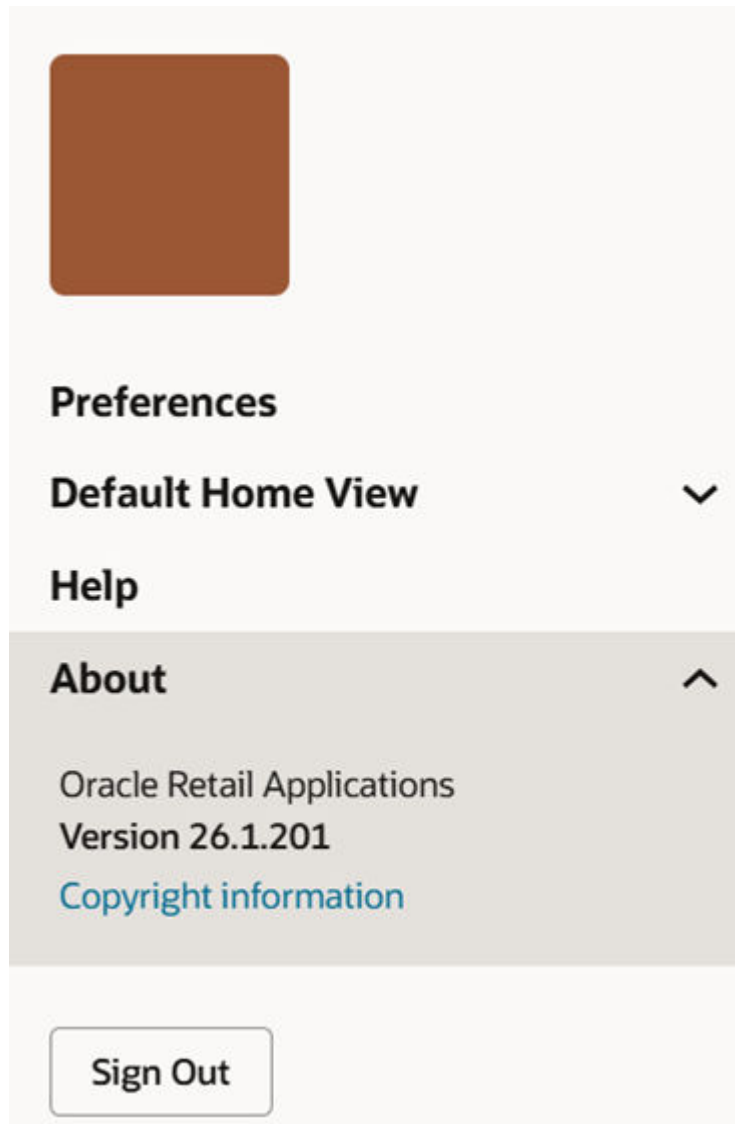
- Preferences
- Default Home View
- Help
- About
- Sign Out

The User Menu is accessed by clicking the avatar image in the upper right corner of the Home Experience page.

Figure 1-8 Home Experience – User Menu



In the User Menu are two collapsed options: **Default Home View** and **About**. Each can be expanded by clicking the down arrow next to the option.

Figure 1-9 User Menu – Default Home View Expanded

Preferences

The only preference that can be set for the Locations Destination is your desired language. This will determine the language in which all labels in the Locations Destination will display. If any data has been translated into the language, you will also be able to see these translated values on various pages in the Locations Destination.

The Language page in the Preferences Destination is where you specify your desired language.

To set your preferences:

1. Open the Locations Destination Home Experience by clicking the "O-tag" icon in the bottom right corner of the screen. The Home Experience displays.
2. Open the User Menu by clicking the avatar icon or image in the upper right corner of the Home Experience.

3. Select **Preferences** from the User Menu. A warning message will display telling you any unsaved work will be discard if you continue. If you have work you wish to save, click **Cancel** to this message and save your work. Otherwise, click the **Discard** button in the message. The Preferences Destination's Home Experience page will open.

Figure 1-10 User Menu

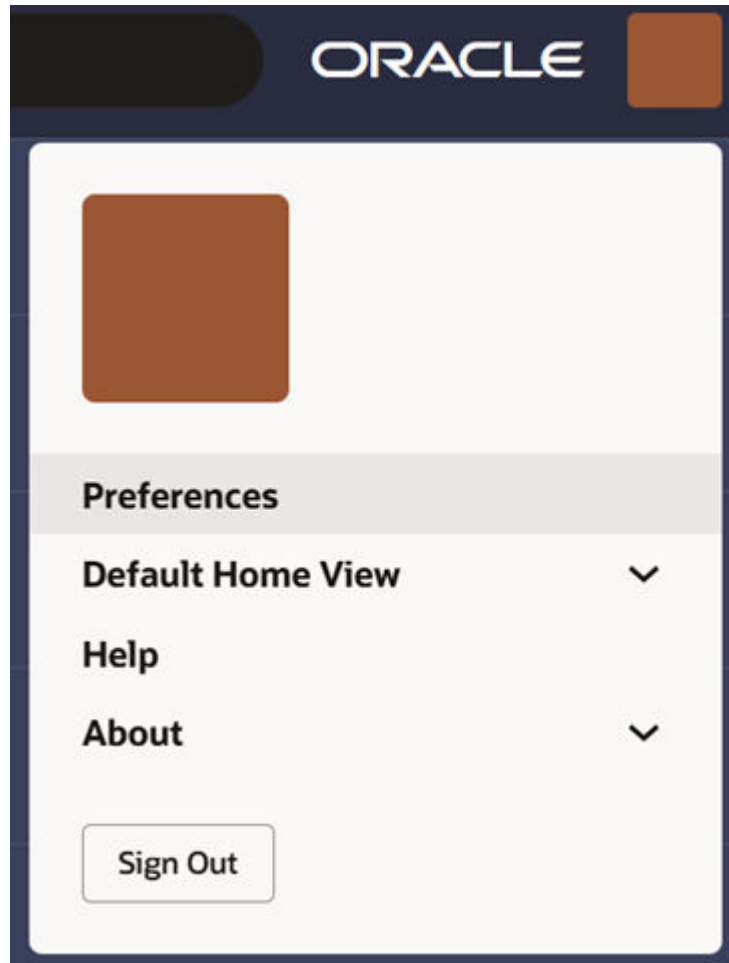
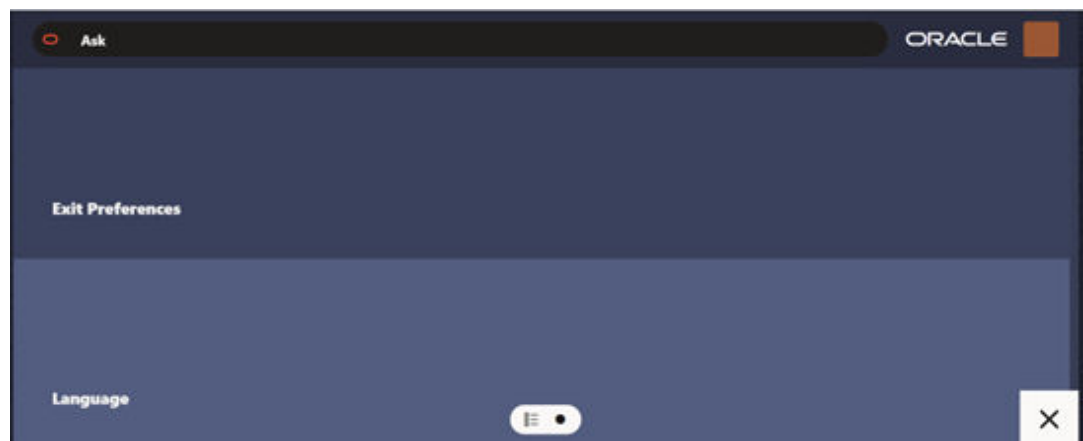
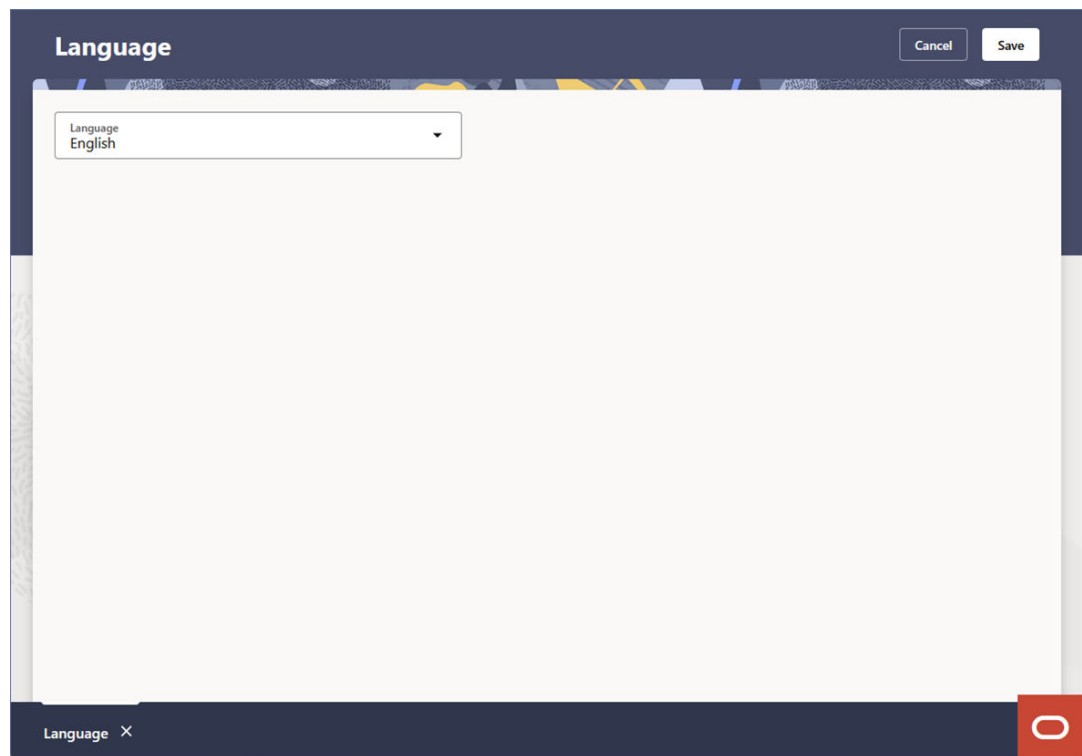


Figure 1-11 Preference Home Experience



4. Select **Language** from the Home page. The Languages page appears.

Figure 1-12 Language Page



5. Select your desired language from the Language page and click the **Save** button to save this change, or click the **Cancel** button to discard your change.

To return to the Locations Destination landing page:

1. Click the “O-tag” Oracle icon in the bottom right corner to open the Preferences Home Experience.
2. Click **Exit Preferences** from the Home Experience page. The Locations Destination appears.

Default Home View

From the User Menu, you can choose your desired Default Home View which is a choice between the Product Map or the Suggestions views. It is a way to indicate your preference as to which view is displayed each time you return to the Home Experience. For more information, see [Choose a Default View](#).

Help

The Location Destination contains an online HTML help that can guide you through the user interface. User information is included to describe high-level processes and procedures, as well as provide step-by-step instructions for completing a task.

You can access online help by selecting the Help link in the **User Menu** from the Home Experience. Once in the help, you can access additional information through the table of contents or by using the index.

About

When the About section is expanded, you will see the version of the solution you are using along with a link to copyright information.

Sign Out

While there is a Sign Out option from within the User Menu of the Locations Destination, this controls your login to the Merchandising solution overall. Whether you sign out from here or from the user menu in the Merchandising browser window, you will be logged out of the Merchandising solution. This means that if you click **Sign Out** from the Locations Destination, when you click back to the Merchandising browser tab or window, you will need to log back into the solution.

2

Common Actions and Items

This section describes some of the common actions, menus, and icons that you see throughout the Locations Destination to help familiarize you with how to navigate through the solution.

Table Level

Note

The figures in this section are representations. Tables may differ slightly, depending on the page, table, or pop up you are viewing.

At the table level, there are commonly one or more action buttons on the left of the table's toolbar and one or more display configurations on the right side of the table toolbar.

Action Buttons and Menus

The Actions available to you, against one or more rows in a table, will be displayed just above the table on the far left of the table toolbar, and/or on a card in a card view, or contained in an Actions menu in an Action column on the table.

These actions, such as create, edit, delete, submit, approve, and so on, will vary from table to table, depending on the functionality available for the records displayed in the table. Some pages may provide additional options, based on the functionality of the page. The details on those more unique options can be found in the documentation for that particular page.

Figure 2-1 Action Buttons in Table Toolbars

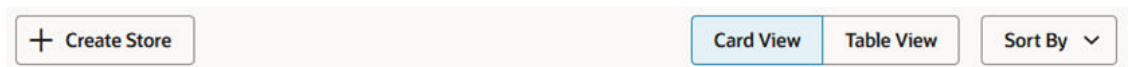


Figure 2-2 Action Buttons and Menus on Cards

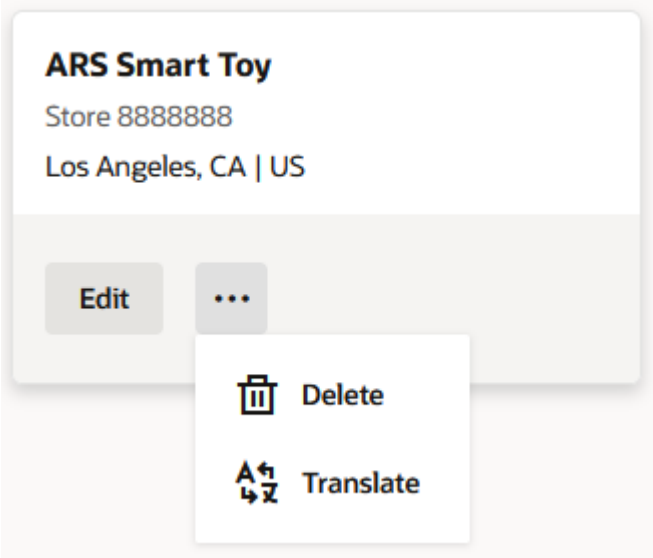


Figure 2-3 Action Menus in Table Columns

16 locations

+ Create Store

+ Create Warehouse

Card View

Table View

Location Type	Location	Name	Secondary Name	Currency	Store Type	
Warehouse	761364740	ATkeenix Distribution Center	ATkeenix Logistics Support Center	US Dollar (USD)		...
Warehouse	263541738	Bangalore Distribution Center		India Rupee (INR)		...
Store	76	Blue Mountain		US Dollar (USD)	Company	Edit
Store	75	Blue Mountain Retail	Blue Mountain Retail	US Dollar (USD)	Company	Delete
Store	1010	Blue Mountain Retail	Blue Mountain Retail US Store12	US Dollar (USD)	Company	Translate
Store	2345998875	Blue Mountain Retail - Madison Avenue AZ	Blue Mountain Retail - Flagship - US Store	US Dollar (USD)	Company	...
Store	3	Butcher Store		Australia Dollar (AUD)	Company	...

Table Display Options

The View toggles, Sort menu, and Column Configuration menu provide the options for managing the display of table data.

Table View Toggle

In some tables you have the option to choose a view such as a card view, table view or list view. This is a way to toggle the display of the same information to align with your preferred viewing experience. The view toggle, if available on the table, will display on the right side of the table toolbar. The currently displayed view will be highlighted in blue.

Figure 2-4 Table View Toggle Button

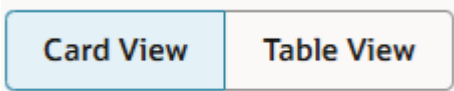
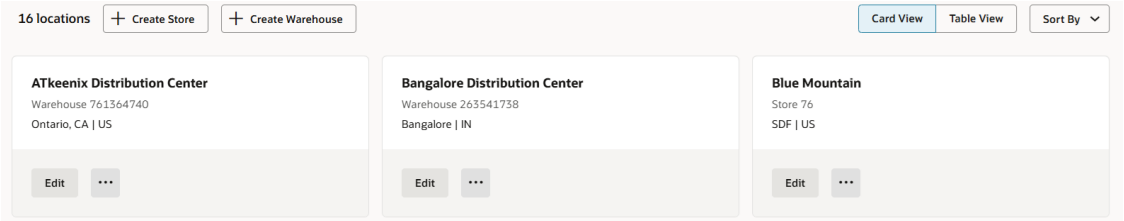


Figure 2-5 Table Displayed in the Card View



Sort Options

When in a standard table view, there may be sorting buttons available next to table column headers. These buttons will allow you to sort the table data on that column in either an ascending or descending order.

Figure 2-6 Table View - Column Sorting Buttons

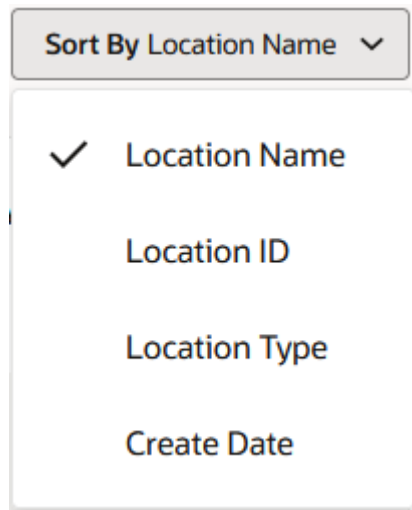
Location Type ⚡	Location ⚡	Name ⚡
Store	88888888	ARS Smart Toy
Store	22111	SmartyPants Mall

When in a card view, there may be a Sort By menu that will allow you to choose a desired column on which the cards should be sorted.

Figure 2-7 Card View – Sort By Menu



Once a column is selected from the Sort By menu, the selected value will be checked and will display in the Sort By menu button's label.

Figure 2-8 Sort By Menu Expanded

Column Configuration



In a table view there may be a column configuration button in the table toolbar. When clicked, the Columns dialog opens.

The Columns dialog includes a list of the table columns that are currently being shown with checkboxes checked, and a list of columns that are currently hidden with checkboxes unchecked.

You can uncheck columns to hide them, check hidden columns to show them, or drag columns between the Show and Hide sections using the handlebar icon on the right side.

To find a desired column, you can use the search box at the top of the dialog.

To restore the display of the table to the original setting, you can click the **Restore Defaults** button at the bottom of the dialog.

To close the Columns dialog, click the **X** at the top right of the dialog.

Figure 2-9 Table Column Configuration – Columns Dialog

Columns

Search

Show

☒ Location Type

==

☒ Location

==

☒ Name

==

☒ Secondary Name

==

☒ Currency

==

☒ Store Type

==

Hide

☐ Tax Region

==

☐ Tax Region Name

==

☐ Channel

==

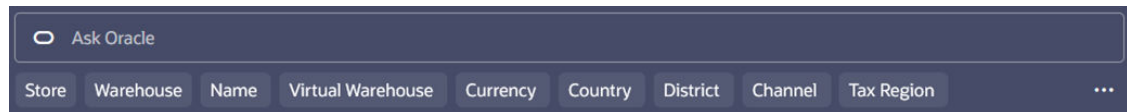
☐ Channel Description

==

Restore Defaults

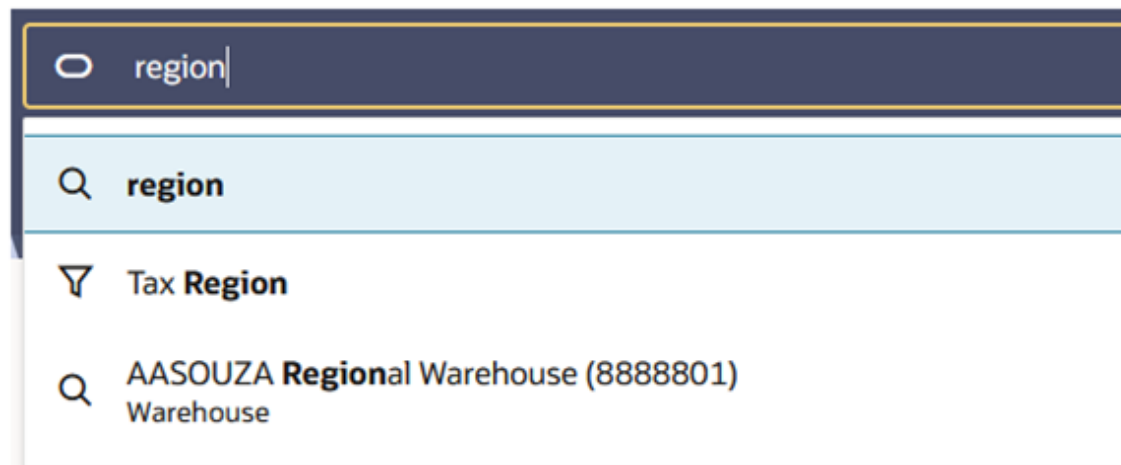
Ask Oracle Search

You can search for a particular entity by entering a keyword or selecting filter chips to set criteria to narrow the list of records displayed.

Figure 2-10 Ask Oracle Search

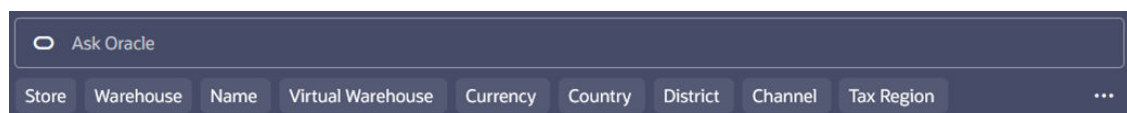
Search Using Keyword Entry

Enter a keyword in the **Ask Oracle** search bar to filter the data on the screen to records that contain values that match the keyed value. As you type, a suggestions list will display with suggested filters (with a filter icon next to it) that match the keyed value and/or records that match (with a magnifying glass icon next to it). You can choose from this list of suggestions, or you can press [Enter] and the data on the screen will be filtered by the keyed in value.

Figure 2-11 Ask Oracle – Suggestions List

Search Using Filter Chips

The Ask Oracle search bar may contain filter chips which allow for quick filtering based on a particular attribute of the data. As filter chips are applied, the data on the screen will be filtered.

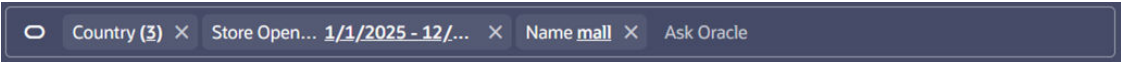
Figure 2-12 Ask Oracle Search with Filter Chips Not Yet Applied

To apply a filter, click the desired filter chip. Doing this will move the chip into the search bar. Depending on the type of filter chip applied, you may have to select or enter a value for the filter chip. For example, when a Currency filter chip is applied, a dropdown will display allowing you to choose a currency (or in some cases multiple currencies) based on which the data in the screen should be filtered. The selected value will display in the applied filter chip with an underline.

Figure 2-13 Close-up View of a Single Applied Filter Chip



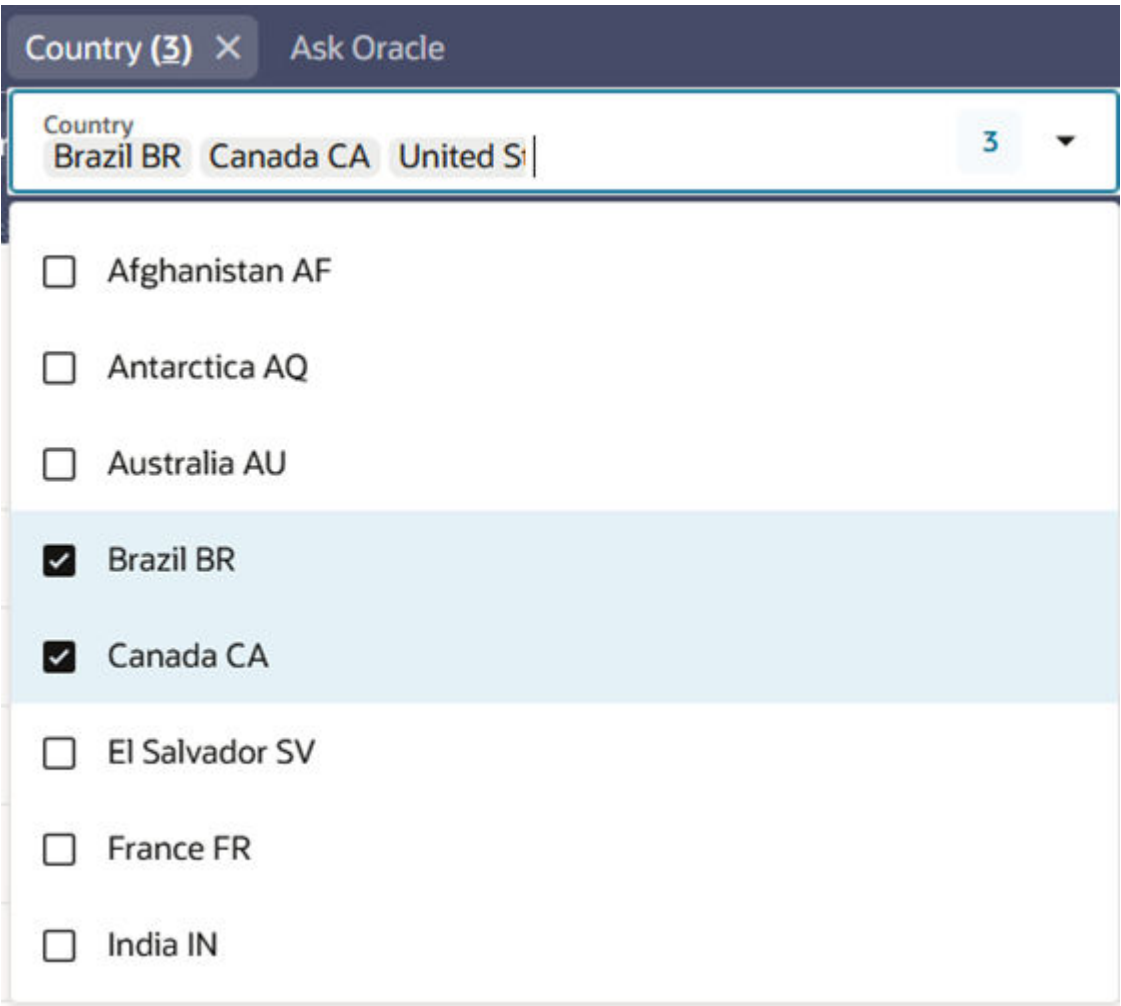
Figure 2-14 Multiple Applied Filter Chips in Ask Oracle Search



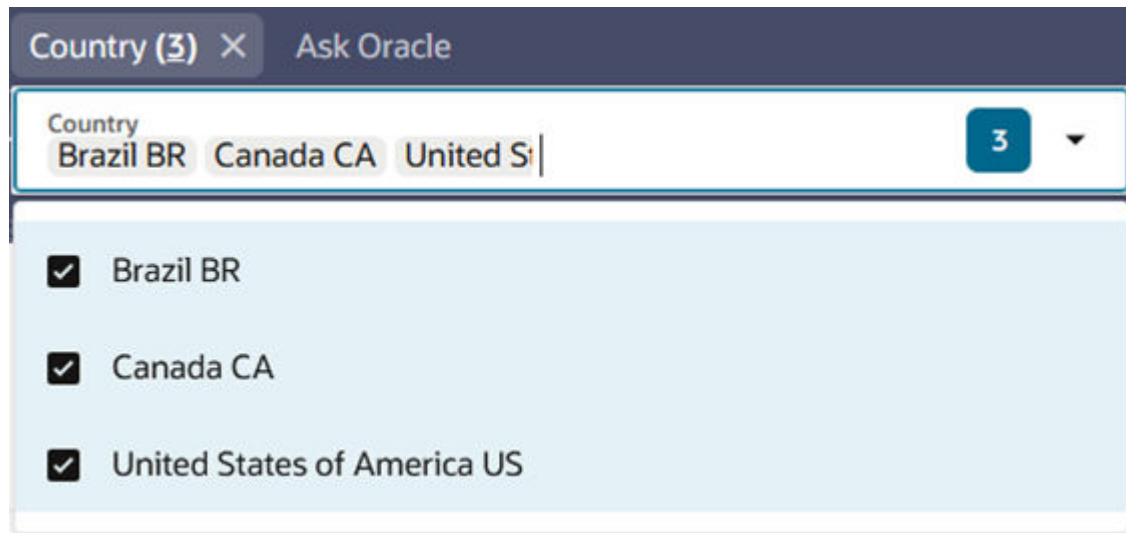
To change the value, click this underlined value and the dropdown will display allowing you to change the selected value(s).

To remove a filter, click the **X** on the applied filter chip.

When a filter chip allows multiple values to be selected you will see checkboxes that can be checked next to the desired values. As you select values, they are displayed in the filter chip's field along with a count of how many have been selected on the right side of the field.



If you click the blue shaded number on the right side of the field, the dropdown will be limited to only the values that were selected, allowing you to see all of the values at a glance.



The screenshot shows a search interface with a dark blue header bar containing the text "Country (3) X" and "Ask Oracle". Below the header is a search input field with the label "Country" and the text "Brazil BR Canada CA United S". To the right of the input field is a blue button with the number "3" and a downward arrow. Below the input field is a dropdown menu with a light blue background, listing three items: "Brazil BR", "Canada CA", and "United States of America US", each preceded by a checked checkbox.

You can also key in the desired value in the dropdown field to filter the list, in order to help you find the desired value to include in the filter.

3

Translate Data

You can create, modify, and delete translations of data in the Locations Destination. The translation task flow allows you to add, edit, delete, or view translations of names, descriptions and address values related to stores and organizational hierarchy levels. You can define translations for these fields in any of the languages installed in your solution.

AI-Generated Translations

AI-generated translations simplify content management across multiple languages by reducing the need for manual translation efforts. You can review and refine the generated translations as needed to ensure accuracy and proper context. Manual entry is also supported, allowing you to enter translations directly if needed.

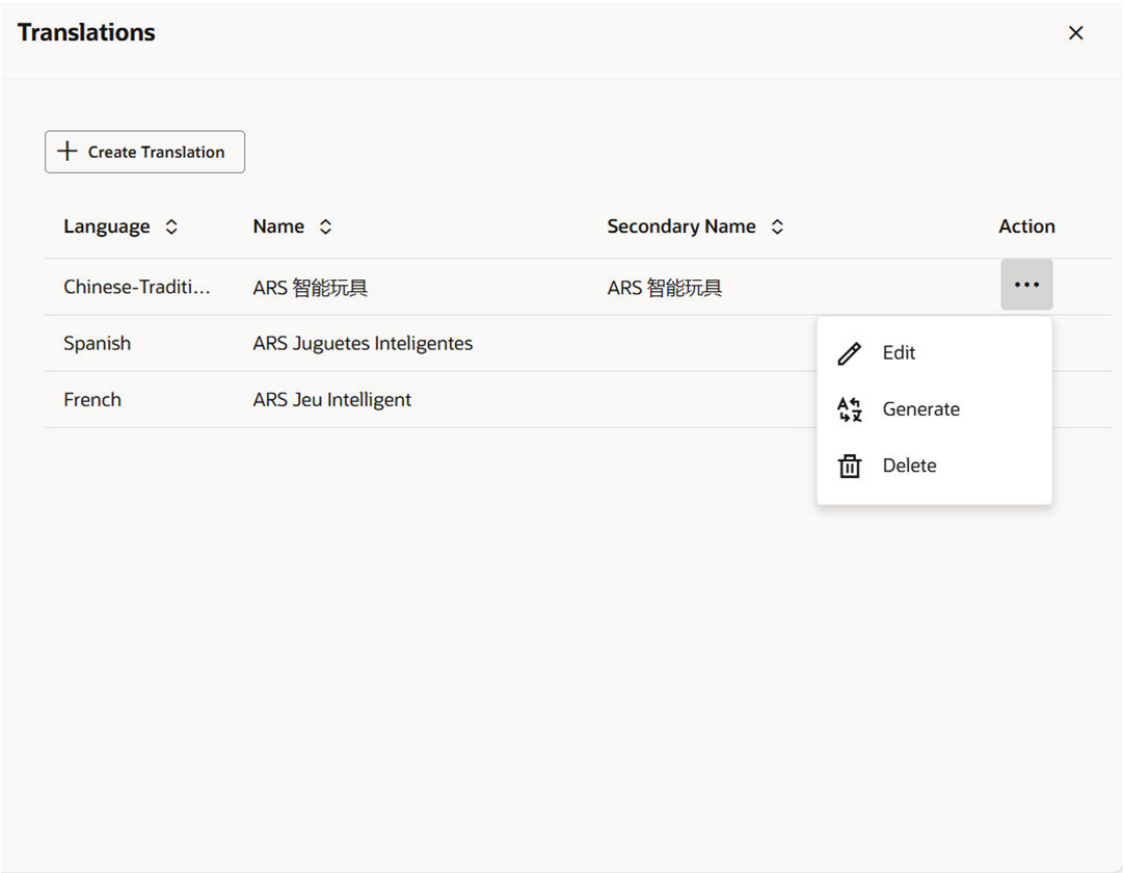
Currently, only a subset of languages supported in Merchandising are available for AI generated translation. If you select a language that isn't supported by the AI model, a notification message will appear. For languages not supported by AI, you can manually enter the translations. The list of languages supported for AI translation currently are Arabic, English, French, German, Hindi, Italian, Indonesian, Portuguese, Spanish, Thai, Tagalog and Vietnamese.

Translation Drawer

The Translations drawer displays a table with the language and the corresponding description for the entity. Existing translations can be modified directly in the table. In the translations table, the first column is always the language column followed by translated columns for the entity.

The last column contains **Overflow Menu** icon. This button reveals a dropdown menu with actions **Edit**, **Generate**, and **Delete**. The **Delete** option deletes an existing translation.

Figure 3-1 Translations Drawer



Add a Translation

To add a translation, follow the steps below:

- 1. Select **Actions > Translate** or use the Translate button, if available. The Translations drawer appears as an overlay on top of the screen.
- 2. Click the **Create Translation** button. The New Translation drawer appears.

Figure 3-2 New Translation

New Translation

Primary Language
English

Current Language
English

Values in the Primary Language

Name
ARS Smart Toy

Secondary Name
ARS Smart Toy

Translations

Language
German

Translated Name *

Enter a Translation or Select Generate

Generate

Translated Secondary Name

Enter a Translation or Select Generate

Generate

Cancel Create and Add Another Create

3. The system's primary language and your current language are displayed at the top of the page along with the primary language values for the fields that can be translated.
4. In the **Language** field, select the desired language from the list. This is a required field.
5. In the **Translated** fields, enter the desired translation or click the **Generate** button to obtain an AI-generated translation. Depending on the entity being translated, there may be more than one translatable field. For example, stores have two translatable fields, store name and secondary name.
6. If the translation was generated, review and refine the translation as desired.
7. Then choose one of the following options.
 - Click **Create** to add the translation to the table and close the page.
 - Click **Create and Add Another** to add translations in additional languages.
 - Click **Cancel** to reject all entries and close the page.

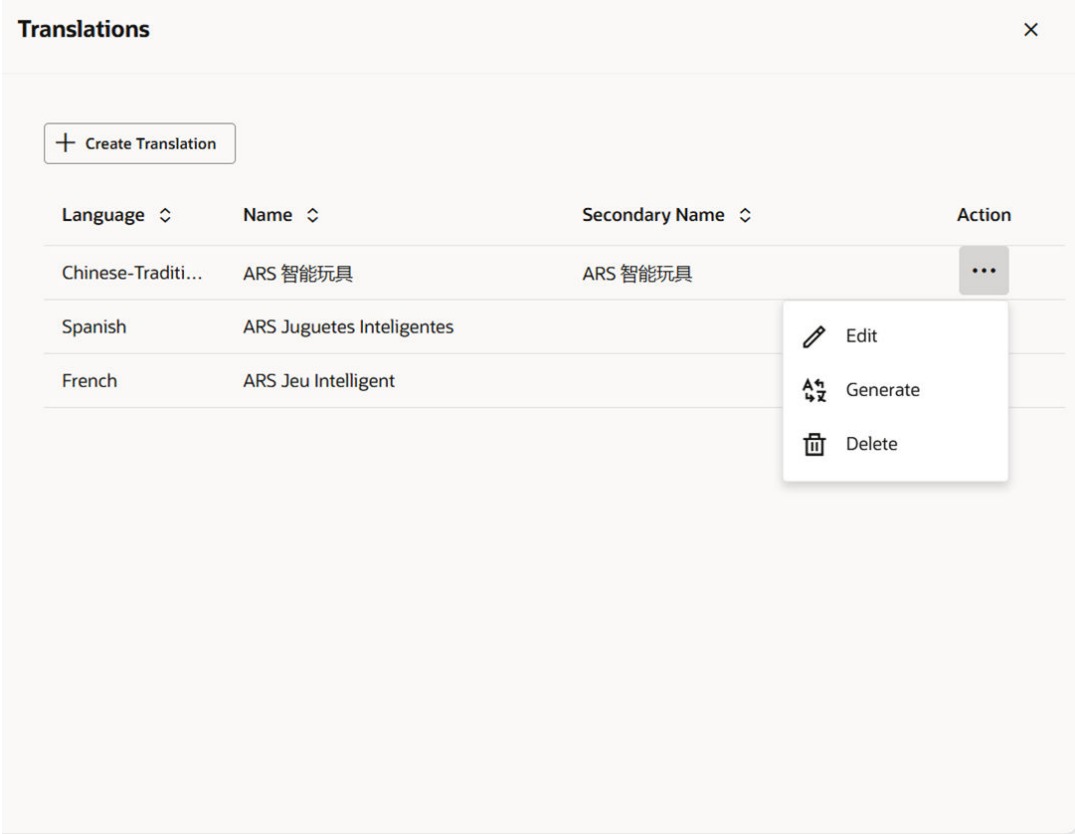
8. To exit the Translations drawer, click the **X** at the top of the drawer.

Edit a Translation

To edit a translation, follow the steps below:

1. Select **Actions > Translate** or use the Translate button, if available. The Translations drawer appears.

Figure 3-3 Translations Drawer



2. Edit the description directly in the table by double-clicking the row or by selecting **Edit** from the **Overflow Menu** in the **Action** column.

Note

The Language field cannot be edited. If a desired language is no longer wanted, the row should be deleted and a new row added for the desired language.

Figure 3-4 Edit Translation Inline

Translations ×

+ Create Translation

Language ⌵	Name ⌵	Secondary Name ⌵	Action
Chinese-Traditi...	ARS 智能玩具	ARS 智能玩具	...
Spanish	ARS Juguetes Inteligentes		✓ ×
French	ARS Jeu Intelligent		...

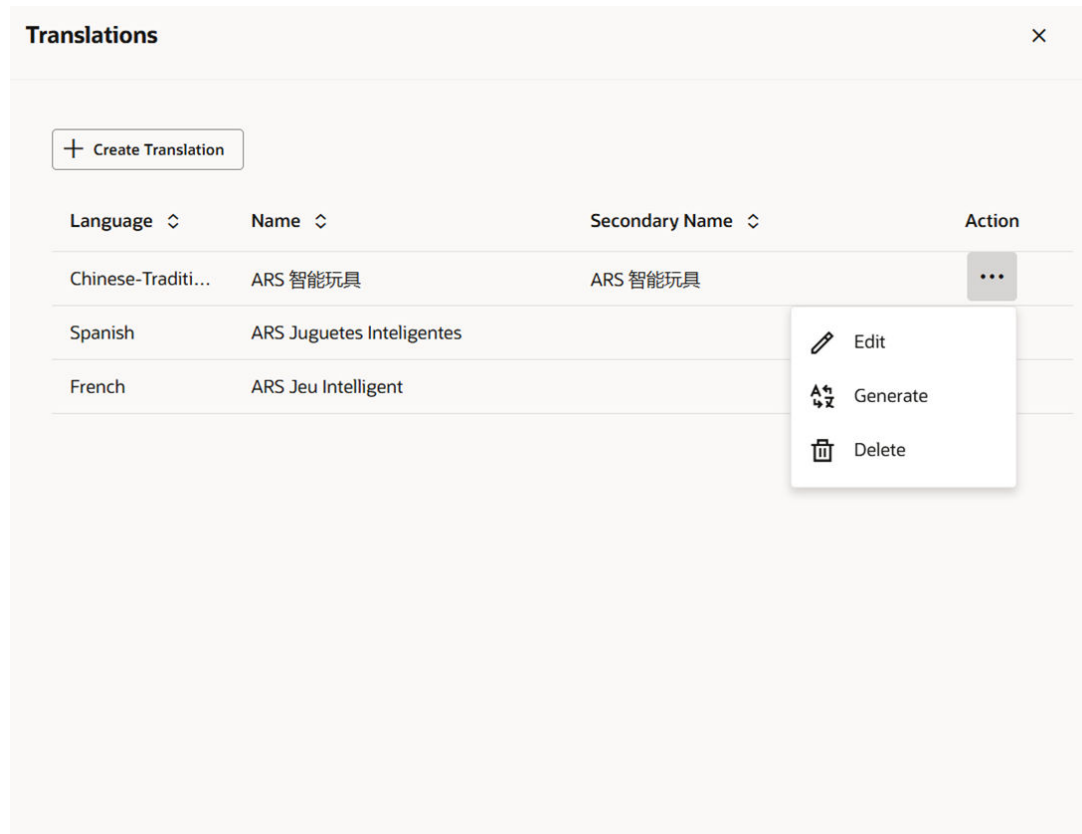
- 3. Click the checkmark button to update the translation or click the **X** on the row to discard your changes.
- 4. Click the **X** at the top of the drawer to close the page.

Regenerate a Translation

To regenerate a translation, follow the steps below.

- 1. Select **Actions > Translate** or use the **Translate** button, if available. The Translations drawer appears.

Figure 3-5 Translations Drawer



2. Select the **Generate** option from the **Overflow Menu** in the **Action** column. The Edit Translation drawer appears.

Figure 3-6 Edit Translation Drawer

The screenshot shows the 'Edit Translation' drawer. At the top, it displays 'Primary Language' as 'English' and 'Current Language' as 'English'. Below this is a section titled 'Values in the Primary Language' with 'Name' as 'ARS Smart Toy' and 'Secondary Name' as 'ARS Smart Toy'. The 'Translations' section features a dropdown menu for 'Language' set to 'Chinese-Traditional'. There are two input fields for translations: 'Translated Name *' and 'Translated Secondary Name', both containing the text 'ARS 智能玩具'. Each field has a 'Generate' button. At the bottom right, there are 'Cancel' and 'Update' buttons.

3. The system's primary language and your current language are displayed at the top of the page along with the primary language values for the fields that can be translated.
4. The **Language** field shows the selected language. This field cannot be edited.
5. To regenerate a previously translated value, click the **Generate** button to obtain an AI-generated translation.
6. Review and refine the translation as desired.
7. Then choose one of the following options.
 - Click **Update** to save the changes and close the drawer.
 - Click **Cancel** to reject all changes and close the drawer.
8. To exit the Translations drawer, click the **X** at the top of the drawer.