

Oracle® Retail Merchandising Foundation Cloud Service Deal and Cost Change User Guide



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Contents

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Preface

Audience	i
Documentation Accessibility	i
Customer Support	i
Improved Process for Oracle Retail Documentation Corrections	i
Oracle Help Center (docs.oracle.com)	ii
Conventions	ii

1

Create a Cost Change

Cost Change by Item	1
Change Costs by Item	1
Header	3
Items	3
Bracket Details	3
Add Items to a Cost Change	4
Mass Update	5
Add Bracket Details	6
Cost Change by Location	7
Header	8
Items	9
Locations	9
Bracket Details	9
Cost Change by Location Toolbar	9
Create Cost Changes by Location	9
Add Items to a Cost Change	10
Mass Update Items	11
Add Locations to a Cost Change	12
Mass Update Locations	13

2 Manage Cost Changes

Cost Change Reasons	2
Add a Cost Change Reason	2
Update a Cost Change Reason	3
Delete a Cost Change Reason	3
Upload Changes	3
Search for a Cost Change	4
Search for a Cost Change Through the Basic Search Criteria	4
Search for a Cost Change Through Advanced Search Criteria	5
Results	6
Cost Change Search Toolbar	6
Update a Cost Change	6
View a Cost Change	7
Approve a Cost Change	7
Submit a Cost Change for Approval	8
Approve a Cost Change	8
Reject a Cost Change	9
Cancel a Cost Change	9

3 Upload/Download Cost Changes from a Spreadsheet

Download from Staging	1
Upload from Staging	2
Download from Merchandising	2
Upload from a File	3
View Issues	4

4 Deals Overview

Types of Deals	1
Create a Deal	4
Add Deal Header Information	6
Add Bill Back and Financials Details	7
Add a Component	10
Add Deal Components	10
Promotions	15
Deal Component Types	17
Add Buy/Get Details	19
Add Items and Locations	21
Item/Locations - View Menu and Icons	22
Add the Item/Locations to a Deal	22

Delete an Item/Location	24
Add Thresholds and Discounts	24
Add the Thresholds of a Deal	24
Edit the Threshold of a Deal	27
Delete the Threshold	27
Create a Purchase Order-specific Deal	27
Manage Deals	28
Search for a Deal	29
Search for a Deal Through the Basic Search Criteria	29
Search for a Deal Through the Advanced Search Criteria	30
Results	32
Deal Search Toolbar	32
Edit a Deal	32
View a Deal	33
Create a Deal	33
Deal Toolbar	33
Deal - More Actions Menu	33
Approve a Deal	34
Change the Status of a Deal	34
Submit a Deal	34
Approve a Deal	35
Reject a Deal	35
Close a Deal	36
Add Comments to a Deal	36
Deal Performance	36
View Deal Performance Page	36
Deal Performance Header	37
Totals	38
Periods	40
Proof of Performance	41
View/Create/Edit Proof of Performance Page	42
Proof of Performance Header	42
Manage Terms	43
Manage Fulfillment	45
Manage Referenced Promotions	46
Add Promotions to a Deal	47
Delete Deal Promotions	47
View Threshold Revisions	47
View Deal Dates	48
View Deal Dates	48
Create a Fixed Deal	49
Create a Fixed Deal	50

Fixed Deal Header	51
Taxes	51
Merchandise Hierarchy	52
Add Merchandise Hierarchy	52
Delete Merchandise Hierarchy	53
Locations	53
Create Locations to a Fixed Deal	53
Delete Locations	54
Fixed Deal Toolbar	54
Create from an Existing Deal	54
Manage Fixed Deals	55
Manage a Fixed Deal	56
Search for a Fixed Deal	56
Search For a Fixed Deal Through the Basic Search Criteria	56
Search a Fixed Deal Through the Advanced Search Criteria	57
Results	58
Fixed Deal Search Toolbar	58
Edit a Fixed Deal	58
View a Fixed Deal	59
Activate/Deactivate a Fixed Deal	60
Activate a Fixed Deal	60
Deactivate a Fixed Deal	60
Delete a Fixed Deal	61
Proof of Performance	62
Manage Terms	62
Manage Fulfillment	63
Manage Referenced Promotions	65
Add Promotions to a Fixed Deal	65
Delete Fixed Deal Promotions	65

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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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- Product version and program/module name
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- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

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To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times not be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Technology Network Web site, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

Oracle Retail product documentation is available on the following web site:

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

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

If a more recent version of a document is available, that version supersedes all previous versions.

Oracle Help Center (docs.oracle.com)

Oracle Retail product documentation is available on the following web site:

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

(Data Model documents can be obtained through My Oracle Support.)

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<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

Create a Cost Change

Cost Management refers to the procedure of maintaining the cost of the different items that are used in the retailer's setup and allow the user to manage any cost changes that occur during the lifecycle of these items.

You can manage cost changes in two different ways:

- [Change Costs by Item](#)

The Cost Change by Item option is used when a cost change needs to be defined at the item/supplier/country of sourcing level.

- [Cost Change by Location](#)

The Cost Change by Location option is used when a cost change needs to be defined at the item/supplier/country of sourcing/location level.

Cost Change by Item

Open the Cost Change or Cost Change by Item page:

From the Tasks menu, select **Cost > Cost Change by Item**. The Cost Change by Item page appears.

Additionally, you can access the Cost change through the Item Search page.

- From the Tasks menu, select **Items > Manage Items**. The Item Search page appears, search for the desired item.
 - In the Results section, select **Actions > Cost Change** or use the **Cost Change** button. The Cost Change page appears.
1. In the **Cost Change** field, enter a description for the change.
 2. In the **Reason** field, enter, select or search for a reason code for the cost change.
 3. In the **Effective Date** field, enter the effective date for the cost change, or use the Calendar icon to select a date.

Change Costs by Item

The initial cost of an item is established at item set-up. The cost of an item can be adjusted in the item record till the item is approved. Any cost changes past that will need to be handled through the cost change pages.

When submitted through EDI, you review the cost change, then submit the cost change for approval.

When entered manually, you enter the cost change, an event description, an effective date and a reason code. Then you can submit the cost change for approval.

Note


You cannot create a cost change for a transformed sellable item.

After you approve the cost change, the item/supplier cost record is updated and any outstanding purchase orders that have not been received are recalculated, if designated on the cost change, based on the updated cost.

You can access the Cost Change by Item page in different ways:

1. From the Tasks menu, select **Cost > Create Cost Change by Item**. The Cost Change by Item page appears.

You can also access the Cost Change by Item page through the Cost Change Search.

1. From the Tasks menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
4. In the Results section, select a cost change.
5. Select **Actions > Edit**, or use the Edit icon . The Cost Change by Item page appears.

Additionally, you can access the Cost change through the Item Search page.

1. From the Tasks menu, select **Items > Manage Items**. The Item Search page appears.
2. Search for the desired item.
3. In the Results section, select a record.
4. Then select **Actions > Cost Change**, or use the **Cost Change** button. The Cost Change by Item page appears.

The page includes the following sections:

- [Header](#)
- [Items](#)
- [Bracket Details](#)

Figure 1-1 Cost Change by Item Page

The screenshot displays the Oracle Merchandising 'Cost Change by Item' page. The header section includes input fields for 'Cost Change' (value: 15005), 'Reason', 'Status' (set to 'Worksheet'), and 'Effective Date'. Below the header is a table titled 'Items' with columns: Item, Description, Sourcing, Supplier Site Name, Country, Primary, Purchase Type, Calculation Basis, Unit Cost (Current, New), Purchase Rate (Current, New), and Cost UOM. The table currently shows 'No data to display'. At the bottom, there is a 'Bracket Details' section and a footer with buttons: Submit, More Actions, Save, Save and Close, and Cancel.

Header

The cost change header section includes the following fields.

Table 1-1 Cost Change Header - Fields and Description

Fields	Description
Cost Change	Enter a description for the cost change. This field contains the cost change number by default.
Reason	Enter, select or search for the reason for the cost change.
Status	The cost change status is displayed.
Effective Date	Enter the date on which the cost changes become effective, or use the Calendar icon to select a date.

Items

In the Items section you can add, delete and mass update items for the cost change.

Bracket Details

The Bracket Details section is only available if bracket costing is applicable. The table contains the bracket details for the highlighted item for a supplier that supports bracket costing.

For items with brackets defined, the old unit cost and the new unit cost information is shown in the Bracket Details section and not in the Items section.

For items with no brackets defined, the cost information is displayed in the Item section and the Bracket Details section remains collapsed.

Add Items to a Cost Change

To add items for a cost change, follow the steps below.


1. In the Cost Change or Cost Change by Item page, go to Items section.
2. Select **Actions > Add**, or use the Add icon . The Add Items pop-up appears.

Figure 1-2 Add Items Pop-up

3. In the Select Supplier or Items section, enter the following fields.
 - a. In the **Supplier Site** field, enter, select or search for the supplier site.
 - b. In the **Country of Sourcing** field, enter, select or search for the sourcing country.
 - c. In the **Item** field, enter, select or search for the item.

Note

If you have accessed the Cost Change page through the Item Search, the selected item is displayed in this field. You cannot change the item and the **Item List** field is disabled.

- d. In the **Item List** field, enter, select or search for the item list.
 - e. Select the **Expand Parent** checkbox to indicate that all the child items linked with the selected parent item need to be added to the cost change.
4. In the Apply To section, select the Purchase Type of the Items to which the Cost Change should be applied. In case of the Purchase Type is Owned, Select whether the change is applicable to **Unit Cost** or **Cost on Effective Date**. In case the Purchase type is Consignment or Concession specify if the Calculation basis should be overridden.

The Update Cost section is refreshed based on the Purchase Type selected

5. For a Purchase type of Owned, in the Update Cost section, select the mode of how the cost change should be applied through one of the following radio buttons.
 - a. Select **Change by Percent** to indicate the cost change in percent. The **Percent** field enables, enter the percent by which the cost changes. Use a negative symbol (-) before the percent to indicate a decrease in cost by percent.
 - b. Select **Change by Amount** to indicate the cost change by a certain amount. The **Amount** field enables, enter the amount by which the cost changes. Use a negative symbol (-) before the amount to indicate a decrease in cost by amount. Then enter, select or search for the currency.
 - c. Select **Enter New Value** to enter a new unit cost value for the item. The **New Value** field enables, enter the new cost of the item. The amount entered becomes the cost of all items selected for the cost change. Then enter, select or search for the currency.
 - d. Select the **Recalculate Order** checkbox to recalculate any outstanding purchase orders that have not been received based on the updated cost.

For a Purchase type of Consignment or Concession, the cost can be modified based on the Calculation basis which can be set to be either Cost per Unit or Purchase Rate. For a Calculation basis of Cost per Unit the cost change can specified by percent, by amount or based on a new value in a manner similar to the how a change is specified for a Purchase Type of Owned. For a Calculation basis of Purchase Rate, the New Purchase Rate value will need to be specified in percentage

6. Select the **Expand Parent** checkbox to indicate that all the child items linked with the selected parent item need to be added to the cost change.
7. Then choose one of the following options:
 - Click **OK** to add the item.
 - Select **OK and Add Another** to add additional items.
 - Click **Cancel** to reject all entries and close the pop-up.

Note

Cost changes created at the parent item level will be cascaded only to those SKUs which have the same purchase type for the selected location. Any SKU having a different purchase type at that location will not be impacted by such a change.

Mass Update

Use the **Mass Update** option in the actions menu to apply the cost changes to the selected items in the table. To update the costs for multiple items, follow the steps below.

1. In the Cost Change or Cost Change by Item page, go to the Items section.
2. Mark the records you want to update in the table. Click the **Mass Update** button. The Mass Update pop-up appears.

Figure 1-3 Mass Update Pop-up

3. In the Apply To section, select the Purchase Type of the Items to which the Cost Change should be applied. In case of the Purchase Type is Owned, select whether the change is applicable to **Unit Cost** or **Cost on Effective Date**. In case the Purchase type is Consignment or Concession specify if the Calculation basis should be overridden.

The Update Cost section is refreshed based on the Purchase Type selected.

4. For a Purchase type of Owned, in the Update Cost section, select the mode of how the cost change should be applied through one of the following radio buttons.
 - a. Select **Change by Percent** to indicate the cost change in percent. The **Percent** field enables, enter the percent by which the cost changes. Use a negative symbol (-) before the percent to indicate a decrease in cost by percent.
 - b. Select **Change by Amount** to indicate the cost change by a certain amount. The **Amount** field enables, enter the amount by which the cost changes. Use a negative symbol (-) before the amount to indicate a decrease in cost by amount. Then enter, select or search for the currency.
 - c. Select **Enter New Value** to enter a new unit cost value for the item. The **New Value** field enables, enter the new cost of the item. The amount entered becomes the cost of all items selected for the cost change. Then enter, select or search for the currency.
 - d. Select the **Recalculate Order** checkbox to recalculate any outstanding purchase orders that have not been received based on the updated cost.

For a Purchase type of Consignment or Concession, the cost can be modified based on the Calculation basis which can be set to be either Cost per Unit or Purchase Rate. For a Calculation basis of Cost per Unit the cost change can specified by percent, by amount or based on a new value in a manner similar to the how a change is specified for a Purchase Type of Owned. For a Calculation basis of Purchase Rate, the New Purchase Rate value will need to be specified in percentage

5. Then choose one of the following options:
 - Click **OK** to apply the change to items in the selection.
 - Click **Cancel** to reject changes made and close the pop-up.

Add Bracket Details

This option is only available if there are already existing brackets set up in the system. A location may have multiple brackets linked to it, all of which are added when the location is

added. You can delete one or more of the brackets. Later, you can add these deleted brackets again by using the Add option.

To add the bracket details of cost change:


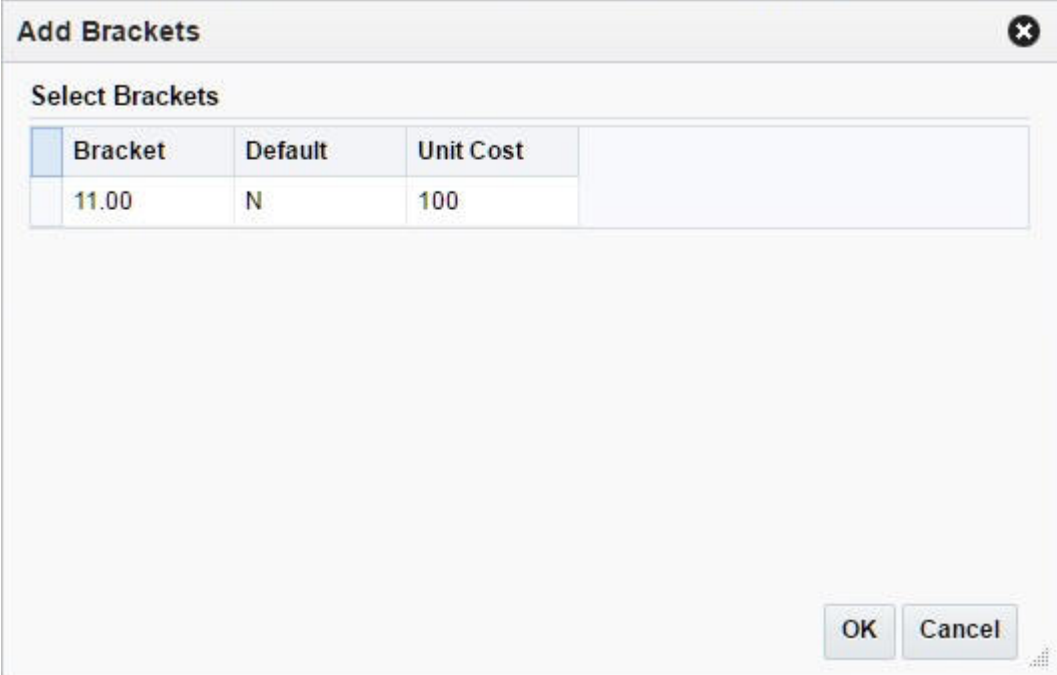
1. In the Cost Change or Cost Change by Item page, go to the Bracket Details section.
2. Select **Actions > Add**, or click the Add icon . The Add Brackets pop-up appears.

Figure 1-4 Add Brackets Pop-up



Bracket	Default	Unit Cost
11.00	N	100

3. Select one or more of these brackets to add them back to the current cost change.
4. Then choose one of the following options.
 - Click **OK** to add the brackets to the current cost change.
 - Click **Cancel** to close the pop-up.

Cost Change by Location

The Cost Change by Location option is used when a cost change needs to be defined at the item/supplier/country of sourcing/location level.

When submitted through EDI, you review the cost change, then submit the cost change for approval.


When entered manually, you enter the cost change, an event description, an effective date and a reason code. Then submit the cost change for approval.

Note

You cannot create a cost change for a transformed sellable item.

After you have approved the cost change, the item/supplier cost record is updated and any outstanding purchase orders that have not been received are recalculated.

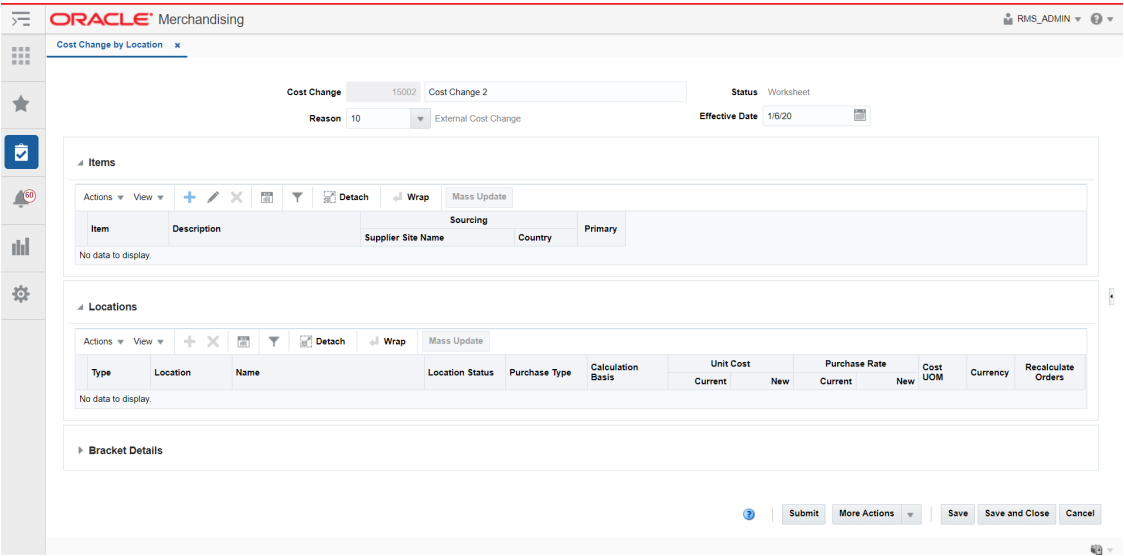
You can access the Cost Change by Item page in different ways:

- 1. From the Tasks menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.
- 2. Enter or select search criteria as desired to make the search more restrictive.
- 3. Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
- 4. In the Results section, select a cost change by location.
- 5. Select **Actions > Edit**, or use the Edit icon . The Cost Change by Location page appears.

The page includes the following sections:

- [Header](#)
- [Items](#)
- [Locations](#)
- [Bracket Details](#)
- [Cost Change by Location Toolbar](#)

Figure 1-5 Cost Change by Location Page



Header

The cost change header section includes the following fields.

Table 1-2 Cost Change Header - Fields and Description

Fields	Description
Cost Change	Enter a description for the cost change. This field contains the cost change number by default.
Reason	Enter, select or search for the reason for the cost change.
Status	The cost change status is displayed by default.
Effective Date	Enter the date on which the cost changes become effective, or use the Calendar icon to select a date.

Items

In the Items section you can add, delete and mass update items for the cost change.

Locations

The Locations section contains the location details for the selected record in the Items section. You can add, delete and mass update locations for the cost change.

Bracket Details

The Bracket Details section is only available if bracket costing is applicable. The table contains the bracket details for the highlighted item for a supplier that supports bracket costing.

For items with brackets defined, the old unit cost and the new unit cost information is shown in the Bracket Details section and not in the Items section.

For items with no brackets defined, the cost information is displayed in the Item section and the Bracket Details section remains collapsed.

Cost Change by Location Toolbar

For information about the toolbar, see "[Screen Level Action - Icons and Buttons](#)" in the *Oracle Retail Merchandising Do the Basics User Guide*.

Create Cost Changes by Location

To create a cost change by location, follow the steps below.

Open the Cost Change or Cost Change by Item page:

1. From the Tasks menu, select **Cost > Create Cost Change by Location**. The Cost Change by Location page appears.
2. In the **Cost Change** field, enter a description for the change.
3. In the **Reason** field, enter, select or search for a reason code for the cost change.
4. In the **Effective Date** field, enter the effective date for the cost change, or use the Calendar icon to select a date.

Add Items to a Cost Change

To add items to a cost change, follow the steps below.


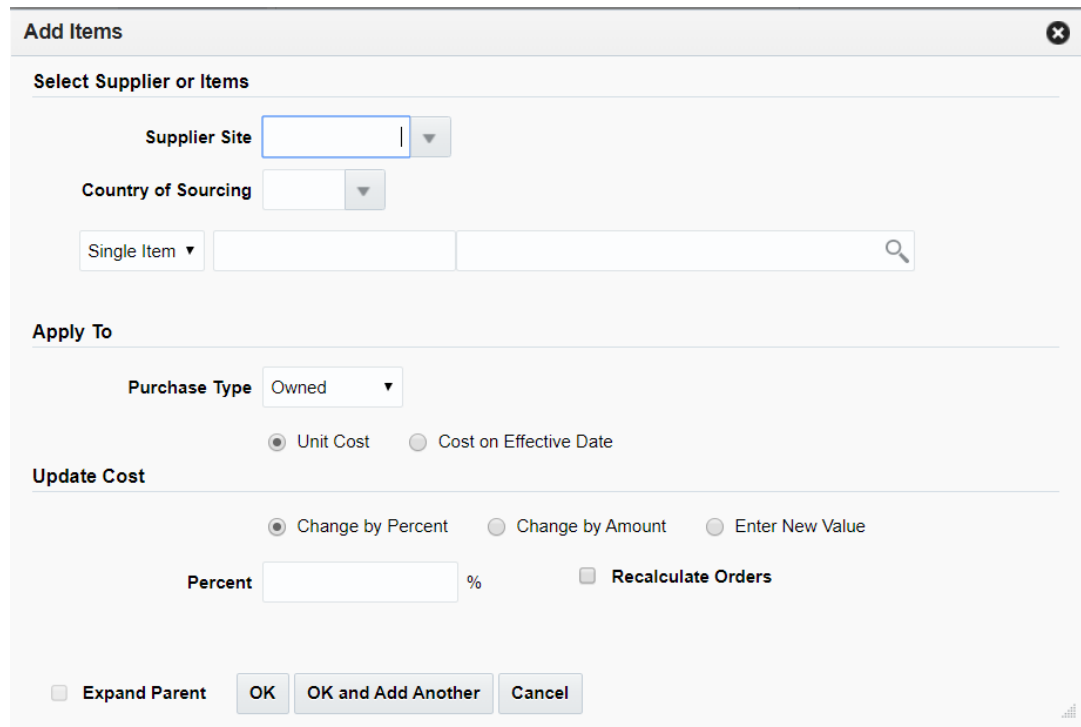
1. In the Cost Change by Location page, go to the Items section.
2. Select **Actions > Add**, or use the Add icon . The Add Items pop-up appears.

Figure 1-6 Add Items Pop-up



3. In the Select Supplier or Items section, enter the following fields.
 - a. In the **Supplier Site** field, enter, select or search for the supplier site.
 - b. In the **Country of Sourcing** field, enter, select or search for the sourcing country.
 - c. In the **Item** field, enter, select or search for the item.

Note

If you have accessed the Cost Change page through the Item Search, the selected item is displayed in this field. You cannot change the item and the **Item List** field is disabled.

- d. In the **Item List** field, enter, select or search for the item list.
4. In the Apply To section, select the Purchase Type of the Items to which the Cost Change should be applied. In case of the Purchase Type is Owned, Select whether the change is applicable to **Unit Cost** or **Cost on Effective Date**. In case the Purchase type is Consignment or Concession specify if the Calculation basis should be overridden.

The Update Cost section is refreshed based on the Purchase Type selected.

5. For a Purchase type of Owned, in the Update Cost section, select the mode of how the cost change should be applied through one of the following radio buttons.
 - a. Select **Change by Percent** to indicate the cost change in percent. The **Percent** field enables, enter the percent by which the cost changes. Use a negative symbol (-) before the percent to indicate a decrease in cost by percent.
 - b. Select **Change by Amount** to indicate the cost change by a certain amount. The **Amount** field enables, enter the amount by which the cost changes. Use a negative symbol (-) before the amount to indicate a decrease in cost by amount. Then enter, select or search for the currency.
 - c. Select **Enter New Value** to enter a new unit cost value for the item. The **New Value** field enables, enter the new cost of the item. The amount entered becomes the cost of all items selected for the cost change. Then enter, select or search for the currency.
 - d. Select the **Recalculate Order** checkbox to recalculate any outstanding purchase orders that have not been received based on the updated cost.

For a Purchase type of Consignment or Concession, the cost can be modified based on the Calculation basis which can be set to be either Cost per Unit or Purchase Rate. For a Calculation basis of Cost per Unit the cost change can be specified by percent, by amount or based on a new value in a manner similar to the way a change is specified for a Purchase Type of Owned. For a Calculation basis of Purchase Rate, the New Purchase Rate value will need to be specified in percentage.

6. Select the **Expand Parent** checkbox to indicate that all the child items linked with the selected parent item need to be added to the cost change.
7. Then choose one of the following options:
 - Click **OK** to add the item.
 - Select **OK and Add Another** to add additional items.
 - Click **Cancel** to reject all entries and close the pop-up.

Mass Update Items

Use the **Mass Update** option in the actions menu to apply the cost changes to the selected items in the table. To update the costs for multiple items, follow the steps below.

1. In the Cost Change by Location page, go to the Items section.
2. Mark the records you want to update in the table. Click the **Mass Update** button. The Mass Update pop-up appears.

Figure 1-7 Items - Mass Update Pop-up

3. In the Apply To section, select the Purchase Type of the Items to which the Cost Change should be applied. In case of the Purchase Type is Owned, Select whether the change is applicable to Unit Cost or Cost on Effective Date. In case the Purchase type is Consignment or Concession specify if the Calculation basis should be overridden.

The Update Cost section is refreshed based on the Purchase Type selected.

4. For a Purchase type of Owned, in the Update Cost section, select the mode of how the cost change should be applied through one of the following radio buttons.
 - a. Select **Change by Percent** to indicate the cost change in percent. The **Percent** field enables, enter the percent by which the cost changes. Use a negative symbol (-) before the percent to indicate a decrease in cost by percent.
 - b. Select **Change by Amount** to indicate the cost change by a certain amount. The **Amount** field enables, enter the amount by which the cost changes. Use a negative symbol (-) before the amount to indicate a decrease in cost by amount. Then enter, select or search for the currency.
 - c. Select **Enter New Value** to enter a new unit cost value for the item. The **New Value** field enables, enter the new cost of the item. The amount entered becomes the cost of all items selected for the cost change. Then enter, select or search for the currency.
 - d. Select the **Recalculate Order** checkbox to recalculate any outstanding purchase orders that have not been received based on the updated cost.

For a Purchase type of Consignment or Concession, the cost can be modified based on the Calculation basis which can be set to be either Cost per Unit or Purchase Rate. For a Calculation basis of Cost per Unit the cost change can specified by percent, by amount or based on a new value in a manner similar to the how a change is specified for a Purchase Type of Owned. For a Calculation basis of Purchase Rate, the New Purchase Rate value will need to be specified in percentage

5. Then choose one of the following options:
 - Click **OK** to apply the change to items in the selection.
 - Click **Cancel** to reject changes made and close the pop-up.

Add Locations to a Cost Change

To add the locations to a cost change:

1. In the Cost Change by Location page, go to the Locations section.


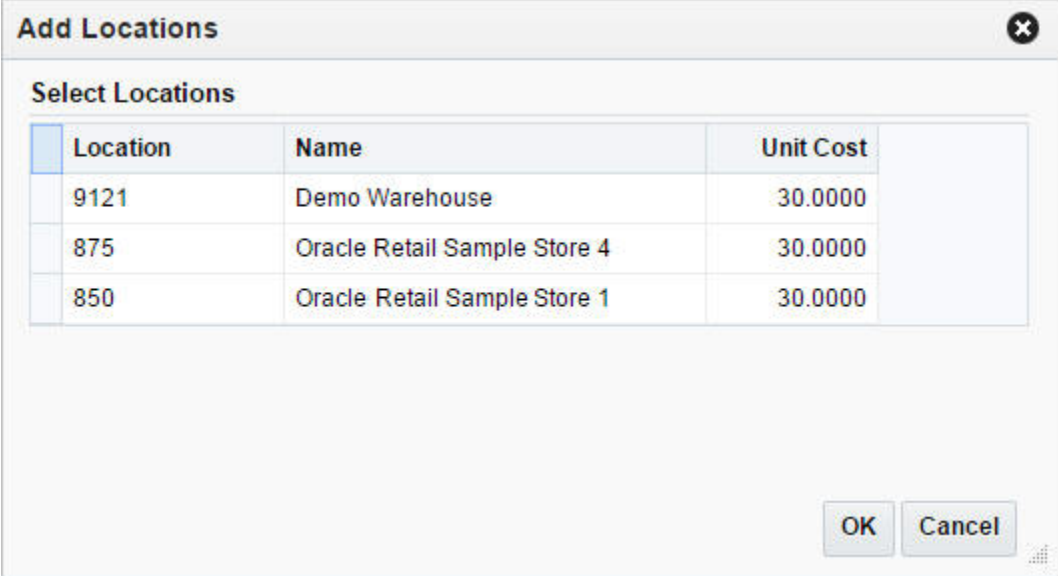
2. Select Actions > **Add**, or click the Add icon . The Add Locations pop-up appears.

Figure 1-8 Add Locations Pop-up



The Add Locations pop-up dialog box has a title bar with the text "Add Locations" and a close button (X). Below the title bar is a section titled "Select Locations" containing a table with three columns: "Location", "Name", and "Unit Cost". The table contains three rows of data. Below the table are "OK" and "Cancel" buttons.

Location	Name	Unit Cost
9121	Demo Warehouse	30.0000
875	Oracle Retail Sample Store 4	30.0000
850	Oracle Retail Sample Store 1	30.0000

3. All locations initially removed from the cost change, because no new cost was specified, are displayed.
4. Select one or more locations in the table.
5. Then select one of the following options.
 - Click **OK** to add the locations to the cost change and close the pop-up.
 - Click **Cancel** to reject all entries and close the pop-up.

Mass Update Locations

Use the **Mass Update** option in the actions menu to apply the cost changes to the selected locations in the table. To update the costs for multiple locations, follow the steps below.

1. In the Cost Change by Location page, go to the Locations section.
2. Mark the records you want to update in the table. Click the **Mass Update** button. The Mass Update pop-up appears.

Figure 1-9 Locations - Mass Update Pop-up

3. In the Location section, select the location information for the mass update.
4. In the Apply To section, select the Purchase Type of the Items to which the Cost Change should be applied. In case of the Purchase Type is Owned, Select whether the change is applicable to **Unit Cost** or **Cost on Effective Date**. In case the Purchase type is Consignment or Concession specify if the Calculation basis should be overridden.

The Update Cost section is refreshed based on the Purchase Type selected. The user can also select a bracket for update.

5. For a Purchase type of Owned, in the Update Cost section, select the mode of how the cost change should be applied through one of the following radio buttons.
 - a. Select **Change by Percent** to indicate the cost change in percent. The **Percent** field enables, enter the percent by which the cost changes. Use a negative symbol (-) before the percent to indicate a decrease in cost by percent.
 - b. Select **Change by Amount** to indicate the cost change by a certain amount. The **Amount** field enables, enter the amount by which the cost changes. Use a negative symbol (-) before the amount to indicate a decrease in cost by amount. Then enter, select or search for the currency.
 - c. Select **Enter New Value** to enter a new unit cost value for the item. The **New Value** field enables, enter the new cost of the item. The amount entered becomes the cost of all items selected for the cost change. Then enter, select or search for the currency.
 - d. Select the **Recalculate Order** checkbox to recalculate any outstanding purchase orders that have not been received based on the updated cost.

For a Purchase type of Consignment or Concession, the cost can be modified based on the Calculation basis which can be set to be either Cost per Unit or Purchase Rate. For a Calculation basis of Cost per Unit the cost change can specified by percent, by amount or based on a new value in a manner similar to the how a change is specified for a Purchase Type of Owned. For a Calculation basis of Purchase Rate, the New Purchase Rate value will need to be specified in percentage

6. Then choose one of the following options:
 - Click **OK** to apply the change to items in the selection.
 - Click **Cancel** to reject changes made and close the pop-up.

2

Manage Cost Changes

The Manage Cost Changes option opens the Cost Change Search page. In this page you can perform the following actions.

- Search for cost changes by various search criteria
- View the search results
- View cost change information
- Create cost changes by item or location
- Edit cost change information
- View cost changes

You can access the Cost Change Search page from the Task menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.

The Cost Change Search page contains the following sections.

- [Search](#)
For more information about how to search for cost changes, see the [Search for a Cost Change](#) section.
- [Results](#)
- [Cost Change Search Toolbar](#)

Figure 2-1 Cost Change Search Page

Cost Change Search

Search

Match ☒ All ☐ Any

Cost Change

Description

Status

Effective Date

Supplier Site

Department

Class

Subclass

Item

Results

Cost Change	Description	Reason	Reason Description	Status	Effective Date	Approved Date	Created Date	Created By
15001	Cost Change	10	External Cost Change	Approved	7/11/16	7/3/16	8/1/16	RMS
20003	Cost Change 9	10	External Cost Change	Approved	7/23/16	7/13/16	8/4/16	RMS
20009	Demo Cost Change 003	10	External Cost Change	Approved	7/24/16	7/13/16	8/5/16	RMS
20010	Demo Cost Change 004	10	External Cost Change	Approved	7/25/16	7/13/16	8/5/16	RMS
20012	Demo Cost Change 015	10	External Cost Change	Worksheet	7/28/16		8/5/16	RMS
15003	Cost Change	10	External Cost Change	Approved	7/13/16	7/3/16	8/1/16	RMS
15005	Cost Change	10	External Cost Change	Approved	7/22/16	7/3/16	8/1/16	RMS
20011	Demo Cost Change 009	10	External Cost Change	Worksheet	7/29/16		8/5/16	RMS
15004	Cost Change	10	External Cost Change	Approved	7/15/16	7/3/16	8/1/16	RMS

Cost Change Reasons

Cost change reasons are a required attribute on any supplier cost changes created in Merchandising. New codes can be added as desired by implementation to configure the solution to meet your company's needs. There are also several that are automatically added to certain systematic events in the solution. Note: the system required codes cannot be deleted, but can have their descriptions updated, if desired. The system required reason codes are:

Code	Description
1	New bracket
2	New bracket structure
3	Default bracket change
4	Primary Supplier Changed
5	Primary Country Changed
6	Primary Loc Changed
7	ItemLoc Supplier/Country Chg
8	RCA cost change
9	Tax Law Changed

The list of valid cost change reasons is defined by a configurable list of codes and descriptions. That list is managed through spreadsheet download and upload processes. These processes are accessed through the main **Merchandising** task list under **Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data**.

To add, update, or remove cost change reasons:

1. Select the **Price and Cost** template type in the Download Data screen.
2. Select the **Cost Change Reasons** template.
3. Click the **Download** button.
4. When prompted do one of the following:
 - Open the .ods file.
 - Save the file, then open it in the spreadsheet application of your choice.

Once opened, there are two sheets that can be modified:

- **Cost Change Reasons** - Create, update, or delete existing reason in this tab.
- **Cost Change Reasons Translations** - Add translated values in this tab.

Add a Cost Change Reason

To add a new reason:

1. Open the **Cost Change Reasons** tab.
2. Select the **Create** action type in a blank line.
3. Enter the **Description** for the reason in the primary language (up to 120 characters).

Note

The primary language is defined in the Merchandising system options.

4. Enter a unique code for the reason (up to 2 digits).
5. If necessary, add reason descriptions in other languages:
 - a. Select the **Cost Change Reasons Translations** tab.
 - b. Select the **Create** action type in a blank line.
 - c. Enter the language for the translated description.
 - d. Enter the code for the new reason.
 - e. Enter the translated description (up to 120 characters).

Update a Cost Change Reason

If you would like to update any details for existing reasons, a similar process will be followed as that described above for creating new reasons. First, download the spreadsheet, and then navigate to the tab where you would like to make your updates.

The following columns can be updated in each tab:

- Cost Change Reasons – Description
- Cost Change Reasons Translations – Description

To update a reason:

1. Select the **Update** action type in the row to update.
2. Enter the correct description.

Delete a Cost Change Reason

To delete a reason that is no longer used by your business, select **Delete** in the action column for each row to delete. Do this in both the **Cost Change Reasons** and **Cost Change Reasons Translations** tabs.

Note

You cannot delete a reason code that is currently associated with a cost change. You will get an error if this occurs when the changes are uploaded.

As noted above, system-generated codes cannot be deleted.

Upload Changes

Once all updates have been made to the data in the spreadsheet, upload the spreadsheet to Merchandising:

1. Save the file and close it.
2. Return to the Merchandising screens.

3. Select **Foundation Data > Upload Foundation Data** from the main task list.
4. Select the **Price and Cost** template type.
5. Select the **Cost Change Reasons** template.
This automatically generates a process description. This can be updated, if desired.
6. Select and upload the file:
 - a. Click the **Browse** button.
 - b. Navigate to the directory where you saved the spreadsheet.
 - c. Select the file.
 - d. Click **Upload**.

The spreadsheet is uploaded and entered into Merchandising.

To review the status of the upload and check whether any errors occurred, select the **Foundation Data > Review Status** task from the main task list.

For more information about uploading data through a spreadsheet, see "[Data Upload](#)" in the *Oracle Retail Merchandising Do the Basics User Guide*.

Search for a Cost Change

To search for a cost change:

1. From the Task menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.
2. You can search for a cost change by using basic or advanced search criteria, depending on the requirement. The basic mode is the default search mode.
 - Click **Advanced** to access the search section in advanced mode.
 - Click **Basic** to return to the basic mode.

Search for a Cost Change Through the Basic Search Criteria

To search for a cost change using basic search criteria:

1. Enter, select or search for one or all of the following basic search criteria.

Table 2-1 Cost Change Search - Basic Search Criteria and Description

Fields	Description
Match option	Check radio button All or Any. All - only suppliers matching all entered search criteria are shown. Any - suppliers matching any of the entered search criteria are shown.
Cost Change	Enter the cost change number.
Description	Enter the cost change description.
Status	Select the status of the cost change from the list.
Effective Date	Enter the effective date for the cost change, or use the Calendar icon to select a date.
Supplier Site	Enter, select or search for the supplier site.

Table 2-1 (Cont.) Cost Change Search - Basic Search Criteria and Description

Fields	Description
Department	Enter, select or search for the department.
Class	Enter, select or search for the class.
Subclass	Enter, select or search for the subclass.
Item	Enter, select or search for the item.

- Click on the Saved Search list to select one of the saved search criteria. Selecting a saved search populates the search section with the saved search criteria. If the run automatically function is enabled for the search, the search is executed immediately.

You can also personalize your saved searches by selecting **Personalize**. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see [Personalize Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

- Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
- Click **Reset** to clear the search section and results.
- Click **Save As...** to save the current search criteria. The Create Saved Search page appears.

For more information about how to save your search criteria, see [Create Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

- Click **Done** to close the page.

Search for a Cost Change Through Advanced Search Criteria

To search for a cost change using advanced search criteria:

- To search using advanced search criteria, enter or select one or all of the advanced search criteria.
- To narrow down the search, use the list next to the search fields. For example, determine if the entered value should equal or not equal the search result.
- Click on the Saved Search list to select one of the saved search criteria. Selecting a saved search populates the search section with the saved search criteria. If the run automatically function is enabled for the search, the search is executed immediately.

You can also personalize your saved searches by selecting **Personalize**. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see [Personalize Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

- Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
- Click **Reset** to clear the search section and results.
- Click **Save As...** to save the current search criteria. The Create Saved Search page appears.

For more information about how to save your search criteria, see [Create Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

7. Click **Add Fields** to add more fields for the advanced search. To remove the field from the search, click the x right next to the field.
8. Click **Reorder** to change the order of the available search fields. The Reorder Search Fields page appears.
 - Select the desired search field and use the up and down arrows to rearrange the order of the fields.
 - Click **OK** to confirm the new order of the fields and close the page.
 - Click **Cancel** to reject any changes and close the page.
9. Click **Done** to close the page.

Results


The Results section lists the retrieved cost changes.

Cost Change Search Toolbar

For information about the toolbar, see "[Screen Level Action - Icons and Buttons](#)" in the *Oracle Retail Merchandising Do the Basics User Guide*.

Update a Cost Change

To edit a cost change event, follow the steps below.

1. From the Tasks menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
4. Select a cost change in the Results section.
5. Then select **Actions > Edit**, or use the Edit icon , or click on the cost change link. The Cost Change page appears.
6. Edit the information in the individual sections.
 - a. Cost Changes by Item
 - In the Items section, edit the new unit cost in the **Unit Cost New** column.

Note

If the cost change contains items with defined bracket costs, you can edit the new unit cost in the Bracket Details section, in the Unit Cost New column.

Note

For items with a change type based on the Purchase Rate, the Purchase Rate field can be edited.

- Select the **Recalculate Order** checkbox to recalculate any outstanding purchase orders that have not been received.

For more information about the available sections of the Cost Change by Item page, see the [Cost Change by Item](#) section.

b. Cost Change by Location

- In the Locations section, edit the new unit cost in the **Unit Cost New** column.

Note

If the cost change contains items with defined bracket costs, you can edit the new unit cost in the Bracket Details section, in the Unit Cost New column.

Note

For items with a change type based on the Purchase Rate, the Purchase Rate field can be edited.

- Select the **Recalculate Order** checkbox to recalculate any outstanding purchase orders that have not been received.

For more information about the available sections of the Cost Change by Location page, see the [Create Cost Changes by Location](#) section.

7. Then choose one of the following options.

- Click **Save** to save your changes.
- Click **Save and Close** to save your changes and close the page.
- Click **Cancel** to reject all entries and close the page.

View a Cost Change

Approve a Cost Change


For a cost change to take effect, it needs to be in approved status. Depending on your user role, you may be able to move the cost change to the next status. A cost change may be in any of the following statuses:

Table 2-2 Cost Change Statues

Status	Description
Worksheet	The cost change event is incomplete. You can edit, submit, or delete the cost change event.
Submitted	The cost change event is complete and submitted for approval. You can approve, reject, or delete the cost change event.
Approved	The cost change event is complete and has been approved. You can return the cost change event to Worksheet status for editing or cancel the cost change event.
Rejected	The cost change event is complete and has been approved. You can return the cost change event to Worksheet status for editing or cancel the cost change event.
Extracted	The details of the cost change event were extracted to the locations affected by the cost change event. Only cost change events in Approved status are extracted.
Cancelled	The cost event is deleted.

Submit a Cost Change for Approval


To submit a cost change for approval, follow the steps below.

1. From the Tasks menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.
2. Restrict the search to cost changes in Worksheet status.
3. Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
4. Select a cost change in the Results section.
5. Then select **Actions > Edit**, or use the Edit icon , or click on the cost change link. The Cost Change page appears.
6. Select the **Submit** button.
7. You are prompted to submit the cost change. Click **Yes** to confirm the prompt. The status of the cost change changes to Submitted.
8. Then choose one of the following options.
 - Click **Save** to save your changes.
 - Click **Save and Close** to save your changes and close the page.
 - Click **Cancel** to reject all entries and close the page.

Approve a Cost Change


To approve a cost change, follow the steps below.

1. From the Tasks menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.
2. Restrict the search to cost changes in Submitted status.

3. Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
4. Select a cost change in the Results section.
5. Then select **Actions > Edit**, or use the Edit icon , or click on the cost change link. The Cost Change page appears.
6. Select the **Approve** button.
7. You are prompted to approve the cost change. Click **Yes** to confirm the prompt. The status of the cost change changes to Approved.
8. Then choose one of the following options.
 - Click **Save** to save your changes.
 - Click **Save and Close** to save your changes and close the page.
 - Click **Cancel** to reject all entries and close the page.

Reject a Cost Change


To reject a cost change, follow the steps below.

1. From the Tasks menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.
2. Restrict the search to cost changes in Submitted status.
3. Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
4. Select a cost change in the Results section.
5. Then select **Actions > Edit**, or use the Edit icon , or click on the cost change link. The Cost Change page appears.
6. Select the **Reject** button.
7. You are prompted to reject the cost change. Click **Yes** to confirm the prompt. The status of the cost change changes to Rejected.
8. Then choose one of the following options.
 - Click **Save** to save your changes.
 - Click **Save and Close** to save your changes and close the page.
 - Click **Cancel** to reject all entries and close the page.

Cancel a Cost Change

To cancel a cost change, follow the steps below.

1. From the Tasks menu, select **Cost > Manage Cost Changes**. The Cost Change Search page appears.
2. Restrict the search to cost changes in Approved status.
3. Click **Search**. The cost changes that match the search criteria are displayed in the Results section.
4. Select a cost change in the Results section.

5. Then select **Actions > Edit**, or use the Edit icon , or click on the cost change link. The Cost Change page appears.
6. Select the **Cancel** button.
7. You are prompted to cancel the cost change. Click **Yes** to confirm the prompt. The status of the cost change changes to Cancelled.
8. Then choose one of the following options.
 - Click **Save** to save your changes.
 - Click **Save and Close** to save your changes and close the page.
 - Click **Cancel** to reject all entries and close the page.

3

Upload/Download Cost Changes from a Spreadsheet

Merchandising supports downloading of cost changes into a spreadsheet to allow you to carry out updates. The updated data can be re-uploaded into a staging area or uploaded into Merchandising. New cost changes can also be created through the upload flow. This section summarizes the workflow for both download and upload of cost change data.

For more information about loading cost change reasons, see [“Download/Upload Data from Spreadsheets”](#) in the *Merchandising Do the Basics User Guide*.

Download from Staging

You can download cost changes either from the staging area or from Merchandising. Typically cost changes are downloaded from the staging areas for purposes of workflow updates such as cost change approval or rejection. The data set to be downloaded can be selected using filter criteria that includes the effective and last update date ranges together with the user ID of the user who carried out the last update for easier workflow tracking. Alternately, you can also select all data that was part of an earlier upload or download request by selecting the process ID that uniquely identifies the request.

Cost Change Download from Staging

Search

Cost Change

Supplier Site

Process

Cost Change Status

Advanced

Saved Search

CostChangeInductionVOCriteria

Effective Date

Created Date

Last Updated By

Search

Reset

Save...

Results

Actions

View

Detach

Download

Cost Change	Cost Change Description	Supplier Site	Process	Process Description	Effective Date	Created Date	Last Updated By
1	cc_upld	33	21741		7/5/16	7/1/16	RMS
131	181 Test		12185	Cost Change - 04/18/2016 00:52	9/8/16	4/18/16	RMS
135	181 Test	20101	12186	Cost Change - 04/18/2016 00:54	9/8/16	4/18/16	RMS
136	181 Test	20101	12301		9/8/16	4/21/16	RMS
181	181 Test	20101	13026	Cost Change - 04/25/2016 04:12	1/25/16	4/25/16	RMS
191	181 Test	20101	19221	Cost Change - 05/24/2016 03:16	1/25/16	5/24/16	RMS
192	181 Test		19229	Cost Change - 05/24/2016 03:30	1/29/16	5/24/16	RMS
789	Location Level Create and delete at the ...		19961	Cost Change - 05/30/2016 02:40	1/30/16	5/30/16	RMS
1890	Location Level Create and delete at the ...		19962	Cost Change - 05/30/2016 02:42	1/30/16	5/30/16	RMS
1980	Location Level Create and delete at the ...		19938	Cost Change - 05/30/2016 02:03	1/30/16	5/30/16	RMS

?

Done

Upload from Staging

Data currently available in the staging area can be uploaded into Merchandising. This is typically for cases wherein the cost change data might have been uploaded into the staging area for review and submission before the upload into Merchandising.

Cost Change Upload from Staging

Search

Cost Change

Supplier Site

Process

Cost Change Status

Submitted

Advanced

Saved Search

CostChangeInductionVOCriteria

Effective Date

Created Date

Last Updated By

Search

Reset

Save...

Results

Actions

View

Detail

Upload

Cost Change	Cost Change Description	Supplier Site	Process	Process Description	Effective Date	Created Date	Last Updated By
20002	100200384	742682982	20350	Cost Change - 06/08/2016 02:56	12/28/15	6/8/16	RMS
30003	100900081 - loc	742682982	20350	Cost Change - 06/08/2016 02:56	1/5/16	6/8/16	RMS
45001	101150016 parent	742682982	20350	Cost Change - 06/08/2016 02:56	12/28/15	6/8/16	RMS
45003	101150059	742682982	20350	Cost Change - 06/08/2016 02:56	12/29/15	6/8/16	RMS
55001	101300037	742682982	20350	Cost Change - 06/08/2016 02:56	12/30/15	6/8/16	RMS
80002	102850049 - submit	742682982	20350	Cost Change - 06/08/2016 02:56	12/31/15	6/8/16	RMS

Done

Download from Merchandising

Similarly data can be downloaded from Merchandising. Cost change data is typically downloaded for purposes of updates such as effective date changes, workflow changes or reporting considerations.

Cost Change Download from RMS

Search

Cost Change: Effective Date: -
 Supplier Site: Created Date: -
 Cost Change Status: Submitted

Advanced Saved Search CostChangeInductionRMSVOCriteria

Search Reset Save...

Results

Actions View Download

Cost Change	Cost Change Description	Supplier Site	Effective Date	Created Date
20002	100200384	742682982	12/28/15	2/17/16
30003	100900081 - loc		1/5/16	2/17/16
45001	101150016 parent	742682982	12/28/15	2/18/16
45003	101150059	742682982	12/29/15	2/18/16
55001	101300037	742682982	12/30/15	2/18/16
80002	102850049 - submit	742682982	12/31/15	2/23/16
620003	107500558-c	5812373557	2/1/16	6/1/16

Done

In addition to downloading cost change data, you can also download blank templates, in a specified template format, that carry just the worksheets and column headers without any data. Such templates are generally used for creating new cost changes manually. Blank Templates can be downloaded from by navigating to **Foundation Data > Data Loading > Download Blank Template**. You need to select the Type as **Cost Change** and one of the Templates from the list available before opting to download the template. For more detail on using Blank Templates see "[Download Blank Templates](#)" in the *Oracle Retail Merchandising Do the Basics User Guide*.

Upload from a File

Once updates have been carried out to downloaded data, you can upload the spreadsheet to have your updates applied in Merchandising or to update the staged cost change data.

Cost Change Upload from File

Source and Destination

Template: Cost Change Source: Choose File No file chosen
 Process Description: Cost Change - 10/03/2016 09:04 Destination:

Upload Done

View Issues

For downloads that occur in the background or uploads, you will receive a notification when the processing is complete. The notification will specify whether the process was executed successfully or not. Clicking on the link in the notification will take you to the Data Loading Status page in order to see the details. Alternatively, this page can be accessed by navigating to the **Data Loading > Review Status** option in the task list.

This task flow opens up the Data Loading status page, which lists the status of each upload/download request. Requests that were processed successfully will have their status set to Processed Successfully. Requests that were not processed successfully will have their status set to either Processed with Errors or Processed with Warnings. For such requests, you can access the View Issues page by clicking on the **View Issues** button to review details of the errors or warnings associated with a selected upload or download request.

Cost Change	Supplier Site	Item	Country of Sourcing	Effective Date	Worksheet	Row	Column	Issue Type	Issue Description
					Cost_Changes	2	Reason	Error	Numeric or value error. Please check field length and...
					Cost_Changes	2	Active Date	Error	Invalid Date Format. Literal does not match format st...
					Cost_Change_Items	2	Cost Change Type	Error	Numeric or value error. Please check field length and...
					Cost_Change_Locations	2		Error	One or more of the following required fields are missi...
					Cost_Change_Locations	2	Cost Change Type	Error	Numeric or value error. Please check field length and...
					Cost_Change_Locations	2	Recalculate Order	Error	Numeric or value error. Please check field length and...
					Cost_Change_Locations	2	Location	Error	Numeric or value error. Please check field length and...

The details provided typically include the worksheet in which the error was encountered, the row and column in the spreadsheet that is in error, and the error description. Issues that are flagged as errors will need to be fixed in order to successfully create or update the cost change in Merchandising. Issues that are warnings can be ignored, but may also require updates to data depending on the warning.

Errors in download processing are typically due to the inability to access the data or insufficient privileges to create and write to the specified location. These errors can be resolved by removing any constraints that might have placed a lock on the data or ensuring that any constraints on creation of the spreadsheet are relaxed.

Errors in upload request processing are typically data-related and likely require data correction. You can use the error details in the View Issues screen as a guide to make corrections to the originally uploaded spreadsheet or download a new version through the Data Loading Status screen. If using this method, a worksheet containing a list of errors associated with the data set will be included as a separate tab in the downloaded spreadsheet to serve as an offline reference for carrying out the corrections. Once the errors have been corrected, the data can be re-uploaded into the staging area or Merchandising as needed, using the corrected file.

4

Deals Overview

This chapter helps you in understanding Deals supported within Merchandising.

A deal is a set of one or more agreements that take place between the retailer and a vendor. A vendor can be a supplier, wholesaler, distributor or manufacturer, and from the vendor, the retailer is entitled to receive discounts or rebates for goods that are either purchased or sold. A deal consists of a set of discounts and/or rebates that are negotiated with the vendor and share a common start date.

Deals can cover a specified period of time. For example, a special deal might be set up based on a promotion or have an open-ended timeframe (such as when a retailer might get 5% off on all merchandise ordered from a specific supplier).

After a deal has been successfully negotiated, it needs to be defined within Merchandising in order to have discounts on purchase orders applied or in order to recover rebates from the supplier. This deal definition is carried out in terms of its components, which include the following: item/locations, thresholds, discounts and funding percentages. Once this setup is complete, the deal can be approved.

Types of Deals

The different types of deals supported within Merchandising are as follows:

- **Off-invoice deals:** This type of a deal is set up between a retailer and a vendor where the retailer is provided a discount on purchase orders raised with the vendor when certain threshold criteria are met by the purchase order. The discount amount gets directly deducted from the cost of the item present in the order, and the retailer is required to pay only the discounted cost. Off-invoice deals are applied when purchase orders with the items on a deal are approved. If a manual cost is entered for the item on the purchase order, deals are not applied to the item unless you request an override of manual costs. Deals that cause the unit cost of an item to be below zero are not applied.
- **Bill Back (BB) deals:** This type of a deal is based on an agreement with a supplier or partner over a fixed or variable duration and has one or more components comprising of merchandise items, locations, thresholds and discounts. The deal definition captures the different thresholds that are set up for the items/locations present in the deal and the related discounts that the retailer is eligible to receive on successfully meeting the thresholds. The thresholds can be based on either purchases or receipts. A regular bill back compares each purchase event against the threshold individually, whereas receipts are compared in the aggregated form. All purchases-based bill back deals will generate income on the net cost of the purchase order, after the off-invoice deals have been applied.
- **Vendor Funded Promotion (VFP):** In order to reduce outstanding inventory or compete against another retailer during certain periods of the year, a retailer may institute a temporary price reduction by creating a promotion in Pricing. To keep profit margins intact, the retailer often negotiates a deal with the supplier wherein the supplier funds part or the entire promotion. This type of vendor funding is created as a Vendor Funded Promotion (VFP) within the Merchandising system.

While setting up the deal, the user can link the one or more promotions and specify the contribution percentage of the vendor for each of them. These promotions need to have their start and end dates within the deal timeframe and at least one offer that is not in the

'Completed' or 'Cancelled' status. The promotion can also be created at a later point when a formal plan has been built and then attached to the deal. After setting up the above information, the deal can be approved for income generation. Merchandising drives the entire creation and invoicing logic for this deal type.

Note

Merchandising does not allow the user to enter budgeted or forecasted values, and the deal income is based on the vendor-supplied contribution percentage.

Two types of promotions can be attached to a deal. One is referential only (accessed via More Actions) while the other generates income (accessed through the Promotion button). It is possible to view the attached promotions and promotion components that have been attached. However, these values are controlled by Pricing and no addition/deletion is possible from the Merchandising end. Further, the existence of a promotion on the screen is not enough to guarantee that income will be generated. The system only gives an indication of all the promotions and contribution percentages that the buyer thought would be assigned to the deal when the promotion is approved.

- **Vendor Funded Markdown (VFM):** Similar to a VFP, a Vendor Funded Markdown (VFM) can be used if a vendor agrees to fund a specific percentage of the markdown. The vendor can support the retailer either by contributing a percentage of the retail price discount for each item on hand or by giving a fixed amount for all the items that still remain in stock. In such scenarios, integration between the Regular/Clearance price changes (in Pricing) and VFM deals (in Merchandising) is essential.

While setting up the deal, the user can define a contribution value or percentage against each component. For values, the amount that is specified will be considered in terms of the currency selected for the specific deal. The user defined values for vendor contribution will be held with the deal even after it is exploded to the item/location level. When a price event goes active on its effective date within Pricing (via a regular price change or a clearance) and it executes a markdown within Merchandising, the backend processing will be changed to analyze all active VFM deals in order to identify any item/location combination impacted by the markdown and record income generated based on the existing process with the modification that the Merchandising deal tables will be used for data references during the entire income accrual calculation process, and not any Pricing based tables. Any price reduction based on a clearance or a price change would be considered here.

Note

A single VFM deal can have multiple components based on the deal parameters, and the user will have to add the set of item/locations linked with each component in the child table.

- **Rebates:** Bill back rebate deals are similar to the bill back deals described above, but these aggregate all the events and compare them against the thresholds in the aggregated form at the end of each reporting period. In addition to purchases and sales, bill back rebate thresholds can also be based on issues for shipment based ones where a vendor provides a deal to move goods that have been received at the retailer's distribution center across single/multiple POs to stores in order to encourage their sale to the end customer. Such a deal would be triggered based on the shipment of goods through a transfer or allocation from the initial order receipt location which would be a warehouse to the final sale location which would be a company store.

- **PO Specific Deals:** In addition to annual and promotional deals, a supplier might also offer certain deals which are specific to a purchase order. This type of a PO Specific Deal can be set up within Merchandising using an option that is available in the PO item setup screen. For such a deal, the Deal Timing gets populated with PO Specific, and the order number gets auto-populated. Only a single PO specific deal can be attached to a purchase order, and this will always be applied last in the sequence when calculating the deal totals. These deals could be defined as off-invoice, allowance, bill-back, or bill-back-rebate deals.
- **Fixed Deals:** Fixed deals allow you to capture one-off payments or a series of payments from a vendor to the retailer. This type of deal caters to certain business setups that require the vendor to give the buyer a fixed amount of money in return for advertising their products for promotional reasons, for in-store demonstrations, or for displaying their merchandise in prime shelf space. A fixed deal comes with a defined amount, duration, billing frequency, and invoicing method. There is built-in logic to auto-generate billing requests for such amounts based on the billing frequency.
- **Promotional Consignment Rate:** This deal type will apply only for items that have been set up as 'consignment' at one or more locations with their costing based on a percentage of the retail selling price. Items need to be linked with at least one active promotion in order to be eligible for this type. When the items present in the deal get sold during the deal lifetime, and include the Promotion ID, then the promotional consignment rate (PCR) specified in the deal would be used in the order/invoicing process with the vendor rather than the regular consignment rate. The deal can also be approved without a linked promotion in order to support a scenario where the promotion gets created at a later point and then attached to the deal. However, for a deal with no associated promotions, the regular consignment rate will be used while determining the cost for the item/location combinations on the deal and not the PCR value. This type of a deal can be set up only if the consignment system option is set to 'Y' and for the primary supplier linked with the item/location combination.
- **Clearance Consignment Rate:** In addition to PCR, this deal type will also apply only for items that have been set up as 'consignment' at one or more locations with their costing based on a percentage of the retail selling price. When the items present in the deal get sold during the deal lifetime, then the clearance consignment rate (CCR) specified in the deal would be used in the order/invoicing process with the vendor rather than the regular consignment rate. This type of a deal can be set up only if the consignment system option is set to 'Y' and for the primary supplier linked with the item/location combination.
- **Allowance:** This type of deal is set up between the retailer and vendor where they negotiate a "discount" amount, which is usually a percentage or amount reduction that will be used to reduce the payment to be made against the invoice but may not result in a reduction of the total invoiced amount or item cost on the order.

The allowance components associated with an allowance deal need to be set up as a cost component similar to expenses and assessments and have a non-merchandise code associated with them. This type of deal will be exclusive in nature and will not impact the order cost. It will be captured as a transactional posting similar to other cost components during order receiving.

Allowance values will be maintained as a non-merchandise code in invoice matching. When an invoice having an allowance value in the document is received, it will be validated against the allowance captured on the purchase order. Variations of allowance deal processes can occur where the vendor does not include the allowance line on the invoice, but the retailer can still take the discount and show this in the remittance advice and bill it to the vendor. If the allowance is provided by vendor, it will be shown on the invoice and will be deducted from the total invoice amount.

This chapter outlines the processes involved in setting up and maintaining all of the above types of deals except Promotional Consignment Rate and Clearance Consignment Rate deal types, which can only be set up for suppliers.

This chapter includes the following topics to help you understand and manage deals:

- [Create a Deal](#)
- [Manage Deals](#)
- [Create a Fixed Deal](#)
- [Manage Fixed Deals](#)

Create a Deal

The Create Deal pop-up allows you to create and maintain deals with partners or suppliers. Deal partners can be wholesalers, distributors, suppliers, and manufactures except in case of Promotional Consignment Rate and Clearance Consignment Rate deal types, which can only be set up for suppliers. Within a deal, you create deal components, specify the items and location for each deal component, and define thresholds.

Components are deals or parts of that deal you receive from a supplier. Multiple components can exist in a single deal. After you add the components, you define thresholds to define the quantity or amount that must be purchased or sold to receive the deal.

Finally, you define the items and locations where the deal can be applied. You can choose to include or exclude locations as necessary.

Additionally, you can define the proof of performance (POP) terms and expected deal income. You can define deal income only for bill back and rebate deals. POP terms are defined by the deal vendor that offers the deal. For deals, POP terms can be defined at the deal, deal/component, or deal component/item loc combination. For fixed deals, the POP terms are defined at the deal level.

To create a deal:

1. From the Tasks menu, select **Deals > Create Deal**. The Create Deal pop-up appears.

Figure 4-1 Create Deal Pop-up

The screenshot shows the 'Create Deal' pop-up window. It includes the following fields and options:

- Deal:** 1310021
- Vendor:** Supplier 12 (AM Supplier)
- Currency:** USD
- Timing:** Promotional
- Active Date:** 9/1/2026
- Close Date:** 9/30/2026
- Billing Type:** Bill Back Rebate
- Threshold Limit Type:** Quantity - number of units
- Threshold Limit UOM:** (empty)
- Recalculate Average Cost:** ☒
- Security:** ☐
- Ref. No.:** (empty)
- Recalculate Approved Orders:** ☐
- Comments:** (empty text area)
- Buttons:** OK, Cancel

2. The deal number is displayed by default.
3. In the **Vendor** field, select the vendor type, enter, select or search for the deal vendor.
4. In the **Currency** field, enter, select or search for the currency.
5. In the **Timing** field, select the timing of deal:
 - **Annual:** A yearlong deal you have with a deal partner. Only one annual deal can be applied to an item at a time. You close the deal manually when it expires, or the deal is

closed automatically when you create another annual deal with the deal partner. On selection of Annual, the Billing Type gets defaulted to Off-invoice and Allowance, and the field is disabled since this is the only possible type of annual deal.

- **Promotional:** A deal that is generally shorter than an annual deal. Multiple and promotional deals can be applied to an item at the same time. The deal closes automatically on the specified end date. Bill Back, Vendor Funded Promotion, Vendor Funded Markdown, Off-invoice, Allowance, Promotional Consignment Rate and Clearance Consignment Rate can all be promotional deals.
6. In the **Active Date** field, enter the date on which the deal becomes active, or click the calendar icon and select the date. The Active Date can also be in the past.
 7. In the **Close Date** field, enter the date on which the deal ends, or click the calendar icon and select the date.


Note

This field is not required for annual deals.

8. In the **Billing Type** field, select the type of deal being created.
 - **Off-Invoice:** The deal is reflected as an amount decremented from the cost on the invoice.
 - **Bill Back/Bill Back Rebate:** The deal income amount is invoiced to the supplier after the goods are purchased. A special type of a bill back is a rebate, which can be calculated on sales, purchase orders or receipts.
 - **Allowance:** This deal is defined as a discount where the retailer and vendor negotiate on a percentage or amount reduction that will be used to reduce the payment of the invoice but may not result in a reduction of the invoiced amount or item cost on the order.
 - **Vendor Funded Promotion:** The deal income amount is generated based on a part or the entire promotion being funded by the supplier for the items present in the deal.
 - **Vendor Funded Markdown:** The deal income is generated based on The vendor contributing a percentage of the retail price discount for each item on hand or by giving a fixed amount for all the items that still remain in stock.
 - **Clearance Consignment Rate:** When the items present in the deal get sold during the deal lifetime, then the clearance consignment rate (CCR) specified in the deal would be used in the order/invoicing process with the vendor rather than the regular consignment rate.
 - **Promotional Consignment Rate:** When the items present in the deal get sold during the deal lifetime, and include the Promotion ID, then the promotional consignment rate (PCR) specified in the deal would be used in the order/invoicing process with the vendor rather than the regular consignment rate.
9. In the **Threshold Limit Type** field, select the type of threshold limit type. Certain deal types such as Off-invoice and Bill Backs allow the tracking of the threshold limit in terms of units or an amount. This does not apply to the Promotional Consignment Rate and Clearance Consignment Rate types.
10. In the **Threshold Limit UOM** field, select the UOM. If units are selected as Threshold Limit Type, you also need to define the Unit of Measure (UOM) that the threshold tracks. It will be disabled otherwise. For PO specific deals, if the Transaction Level Discount is set to Y, the threshold limit type is always Amount.

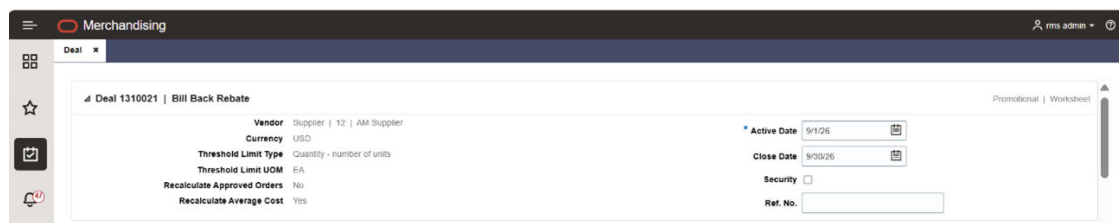
11. Select the **Recalculate Approved Orders** check box. This is applicable to Off-invoice and allowance deal. This indicates whether approved orders should be recalculated based on the current deal parameters and applies in case of off invoice and allowance deal. If this is checked, any approved order currently in the system that meets the deal criteria is recalculated based on the new deal once it is approved.
12. Select **Recalculate Average Cost**. This is applicable to billback and billback rebate deals. This indicates whether the Deal Income computed should be used to recalculate the value of inventory contributing to the deal income. If this is checked, the deal income computed will be apportioned to all eligible units that contributed to the income. The eligible units will be identified using the inventory layers functionality and the average cost adjusted for the eligible units available at each location. If unchecked, the income computed for a period will be recorded as whole without explicit revaluation of the specific units that contributed to the deal.
13. Select the **Security** check box. This indicator is used to implement user based security for the deal that is currently being created. In case this has been set for a deal, the deal details can be viewed or edited only by users who have the same or higher privileges compared to the deal creator.
14. In the **Ref. No.** field, enter a number.
15. In the **Comments** field, enter any additional comments as necessary.
16. Click **OK** to save any changes. The Deal page appears.
17. Click **Cancel** to return to the Tasks menu without saving changes.

Note

You can also create a deal by clicking **Create** in Actions menu, or by clicking the Create icon  on the Deal Search page.

Add Deal Header Information

Figure 4-2 Deal Header



The Deal Header includes the following fields.

Table 4-1 Deal Header - Fields and Description

Fields	Description
Title	<p>The title displays Deal ID and Billing Type with a separator between them to the top left of the head container. The Deal Timing and Deal Status is displayed with a separator between them to the top right of the head container.</p> <p>The possible values for billing type are Off invoice, Allowance, Bill Back, Bill Back Rebate, Vendor Funded Markdown, Vendor Funded Promotion, Clearance Consignment Rate, and Promotional Consignment Rate.</p> <p>The deal number is populated by default.</p> <p>The possible values for deal timing are Promotional and Annual.</p>
Deal Status	<p>The description of the deal status is displayed as text. If you create a deal the status is Worksheet. For more information on deal status, see the Change the Status of a Deal section.</p>
Vendor	This field displays the type of vendor, vendor ID, and name.
Currency	This field displays the deal currency.
Threshold Limit Type	This field displays the threshold limit type.
Threshold Limit UOM	This field displays the threshold limit UOM.
Recalculate Approved Orders	This field displays as Yes, if the Recalculate Approved Orders check box is checked in the Create Deal pop-up. This field will display as No, if the Recalculate Approved Orders check box is unchecked in the Create Deal pop-up for off-invoice deals.
Active Date	This field displays the date on which the deal becomes effective.
Close Date	This field displays the date on which the deal ends.
Security	This field displays if the deal was created with user security.
Ref. No.	Enter the deal reference number.
Order No.	This field displays the order number in case of PO specific deals.

Note

The **Active Date**, **Close Date**, **Security**, and **Ref. No.** fields are editable. However, the remaining fields are displayed based on the information entered in the Create Deal pop-up.

Add Bill Back and Financials Details

The Bill Back and Financials section gets displayed for Bill Back (BB), Bill Back Rebate (BBR), Vendor Funded Markdowns (VFM) and Vendor Funded Promotions (VFP) type deals.

Figure 4-3 Bill Back and Financials Page

The Bill Back and Financials section includes the following fields.

Table 4-2 Bill Back and Financials - Fields and Description

Fields	Description
Deal Reporting Level	The deal reporting level determines the length of the reporting periods that would be created for income generation. The options provided to you depends on the calendar type that is being used in the Merchandising instance. For a 4-5-4 calendar, this can be Week, Month, or Quarter, while for a Gregorian calendar, only Month or Quarter can be selected. Income is calculated once per reporting period. The reporting level also indicates the maximum frequency at which an invoice is raised against the income accrued by the deal.
Deal Basis	Select whether the deal will be based on purchase, sales or issues. Bill back deals are based on purchases and sales, while bill back rebate deals can be based on purchases, sales or issues.
Include Franchise Purchases (or Sales)	Select whether the deal will include franchise purchases (for purchase-based deals) and sales (for sales-based deals) or not. To use this feature, the invoicing location (present as COSTING_LOC at the item/franchise store level) needs to be added in the deal and already ranged to the items in the Franchise order for any income to be generated.
Deal Invoicing Basis Note: This does not apply to VFP/VFM deals.	Select the Deal Invoicing Basis. The options for Deal Invoicing Basis depends on whether the deal is purchase or sales based. Purchase based deals can have this set to the Approved POs, Receiving (uses Net Receipt logic), Gross Receipt, or Invoice Matched Quantity (for purchase-based deals). Sales based deals do not have timing specified since they are driven by sales records and are applied only when a sale occurs. Issue (Transfer/Allocation) based deals accrue income based on movement of inventory from a warehouse to a store via a transfer or a PO/ASN sourced allocation and have the timing defaulted to 'Shipment'. All types of inventory movements within the same transfer/legal entity would be eligible for a movement based deal as long as they originate from a warehouse (source location) and terminate at a company store (destination location) which is part of the deal definition.
Use Suggested Retail	Indicates whether the Suggested Retail value defined at the item location level needs to be used instead of the actual selling retail in order to determine the deal income for sales-based deals.
Add Deal Reporting Days Note: This does not apply to VFP/VFM deals.	This field is used to capture the number of extra reporting days that should be added to the deal actual forecast data to cater to the late postings of the transactions after the deal close date.

Table 4-2 (Cont.) Bill Back and Financials - Fields and Description

Fields	Description
Pack Level Tracking	For receipt-based Bill Back and receipt or sales-based Bill Back Rebate deals, the indicator for tracking the deal at the pack level is enabled. Select this indicator to generate income for purchase orders which involve receiving at the pack level or sales occurring at the pack level. This is enabled only for receipt based bill back and receipt or sales based bill back rebate deals.
Rebates sub section:	
Rebate Calculation Type	Select the rebate calculation type from the list. This field determines the method in which the comparison of thresholds is performed against the actual turnover figures. Here the term turnover refers to the total revenue generated for a period across the merchandise hierarchy for which the deal is applicable. This is defaulted to Linear and disabled for a BB deal, while for a BBR, you can set it to Linear or Scalar.
Growth Rebate	A rebate in which the supplier determines the amount of the rebate, based on increased orders over a specified period of time. The Growth Rebate information is available only for Bill Back Rebate deals and is for informational and reporting purposes. Selecting this indicator enables the Historical Period fields and allows a buyer to set up a growth rebate deal by looking up prior receipt or sales values in the data warehouse system. The growth percentage can then be manually applied to these values to come up with thresholds that would be applicable for the current deal.
Historical Period	The start and end dates of the historical period against which growth will be measured for this growth rebate.
Start Date	
End Date	
Financials sub section:	
Bill Back Period	Select the period for how frequently the vendor is billed. This period needs to be at least as large as the reporting period because income calculation is performed only at the end of a reporting period. For the 4-5-4 calendar, the choices for the invoice periods are: Week, Month, Quarter, Half Year, Annual, or Deal End (one bill for the entire deal period). The same choices apply for Gregorian calendar, except Week. This field remains editable until the first invoice has been raised against the deal.
Billing Vendor	This field indicates the vendor to be billed for the specific deal, which can be different from the vendor specified for the deal in Deal Head. Select the vendor type and enter, select or search for the vendor.
Estimated Next Invoice Date	The estimated date the next invoice is going to be sent to the vendor. Enter the correct date or click the calendar icon and select the correct date. The effective date for raising the invoice will depend on when the financial month is closed. The estimated next invoice date gets populated initially based on the bill back period. It takes the last day of the period that will be invoiced. After the invoicing batch program Vendor Deal Invoicing (vendinv) runs, this date is updated with a Gregorian week, month, or quarter, or the 4-5-4 week setup based on the calendar configuration in the system. This date can be modified throughout the deal's lifetime, even after approval until the last invoice against the deal has been processed.
Last Invoice Date	This field is updated to hold the last reporting period that was invoiced. Enter the date or click the calendar icon and select the date.

Table 4-2 (Cont.) Bill Back and Financials - Fields and Description

Fields	Description
Bill Back Method	This indicates whether invoices raised for this deal are in the form of a credit note or a debit note. The option selected here overwrites the supplier's default setup in Invoice Matching. This field remains editable until the last invoice against the deal has been processed.
Deal Income Calculation	The basis for calculating the amount earned from the deal. Actual will only generate income on real turnover. Pro-rated calculates income based on forecasts and actual turnover and distributing this income over all open periods. For BB and BBR types of deals, you have the option of calculating the deal income based on the actual values earned until the current date, or of using the method of proration on the forecasted amount.
Invoice Processing Logic	Select the method for how invoices will be raised for this deal. You have the following options available in the case of BB and BBR type of deals - Automatic all values, manual all values, automatic positive values, manual positive values only, no invoice processing. This field remains editable until the first invoice has been raised against the deal.
Deal Income in Stock Ledger	Select the check box to indicate that deal income accrual should be written to the stock ledger.
Include Taxes	In the Global Tax Solution (GTS) setup, the system will support multiple tax codes at the item level within a deal as long as this checkbox is selected. In a non-GTS setup, just a single tax can be linked with the items within the deal.
Tax Region	Select a tax region different from the one associated with the deal location.

Add a Component

On the Deal Components section, you can manage deal component information. Deal components are discounts or rebates included in the deal. When you enter deal component information, you determine the billing type, Threshold Value Type, Deal Class, Cost Apply type, and other parameters about how deal component is calculated. You can also specify that a deal component is a transaction level discount that applies to entire purchase orders rather than individual items.

The component type description can be added for deal component information as well as a defaulting contribution percentage.

Note

Merchandising is the custodian of the invoicing logic and will drive the invoicing functionality.

Add Deal Components

You can add deal components to a deal while creating or editing in the Deal page.

To add deal components:

1. From the Tasks menu, select **Deals > Create Deal**. The Create Deal pop-up appears.

- 2. Enter the relevant data and click **OK** to save the changes. The Deal page appears.
- 3. In the Deal page, go to the Components section.
- 4. **Figure 4-4 Components Section**

Deal 815006 | Off-invoice

Vendor: Supplier | 867481546 | Fashion Retailer US Supplier

Currency: USD

Threshold Limit Type: Quantity - number of Units

Threshold Limit UOM: EA

Recalculate Approved Orders: Yes

Active Date: 12.1.2019

Close Date:

Security:

Ref. No.:

Components

Component	Type	Description	Deal Class	Comments	Threshold Value Type	Cost Apply Type	Transaction Level Discount	Calculate Income From Zero Threshold	Deal in Price Cost
No data to display.									

Buttons: Submit, More Actions, Save, Save and Close, Cancel


- 5. From the Actions menu, click **Add** or click the Add icon . The Add Component pop-up appears.

Figure 4-5 Add Component Pop-up

Figure 4-5 Add Component Pop-up

Add Component

Type:

Threshold Value Type:

Deal Class: Cumulative - discs summed then applied

Cost Apply Type: Net Net Cost

Transaction Level Discount:

Calculate Income From Zero Threshold:

Deal in Price Cost:

Comments:

Buttons: OK, OK and Add Another, Cancel

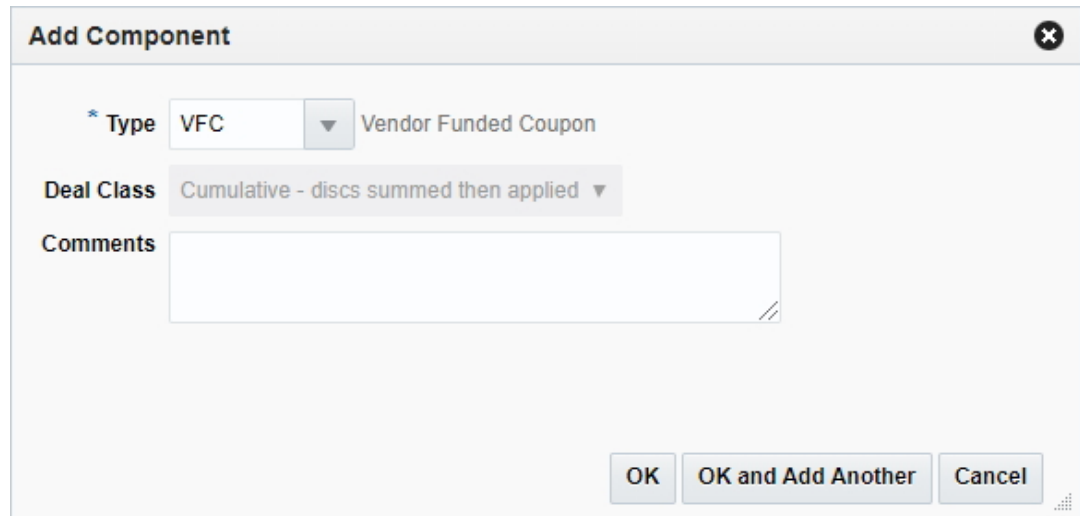
For a Vendor Funded Markdown type of deal, the user can specify the contribution type and the contribution amount of the vendor to the markdown, that can be defined in the form of a value or a percentage in the Add Component pop up. For values, the amount that is specified will be considered in terms of the currency selected for the specific deal.

Figure 4-6 Add Components - Vendor Funded Markdown

The 'Add Component' dialog box features a title bar with a close button. It contains the following fields: a 'Type' dropdown set to 'VFC' with a tooltip 'Vendor Funded Coupon'; a 'Deal Class' dropdown set to 'Cumulative - discs summed then applied'; a 'Vendor Contribution' dropdown set to 'Amount' next to an empty input field; and a 'Comments' text area. At the bottom right are three buttons: 'OK', 'OK and Add Another', and 'Cancel'.

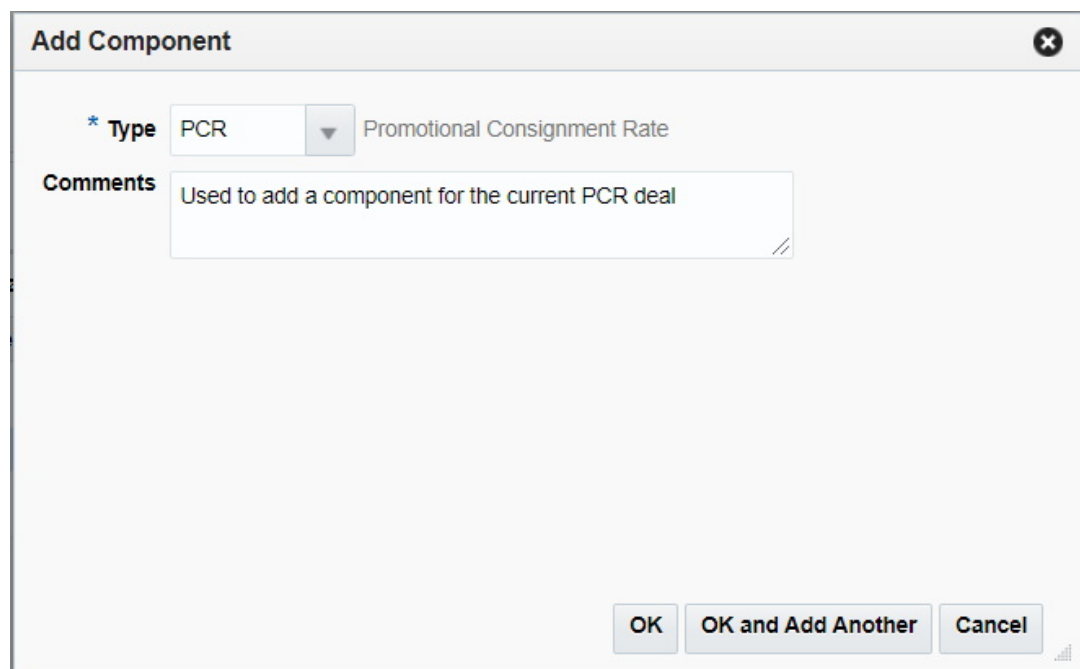
Figure 4-7 Add Components - Vendor Funded Markdown Percent

This 'Add Component' dialog box is similar to the one in Figure 4-6, but the 'Vendor Contribution' dropdown is set to 'Percent', and the input field is followed by a '%' symbol. The other fields and buttons are identical.

Figure 4-8 Add Components - Vendor Funded Promotion

The screenshot shows a dialog box titled "Add Component" with a close button (X) in the top right corner. Inside the dialog, there are three main sections: "Type", "Deal Class", and "Comments". The "Type" section has a dropdown menu with "VFC" selected, and a tooltip "Vendor Funded Coupon" is visible. The "Deal Class" section has a dropdown menu with "Cumulative - discs summed then applied" selected. The "Comments" section is a text area that is currently empty. At the bottom right of the dialog, there are three buttons: "OK", "OK and Add Another", and "Cancel".

For a Promotional Consignment Rate type of deal, the Add Component pop-up can be used to add one or more components to the deal. For each such component, one or more promotions with individual consignment rates can be added.

Figure 4-9 Promotional Consignment Rate - Add Component

The screenshot shows a dialog box titled "Add Component" with a close button (X) in the top right corner. Inside the dialog, there are two main sections: "Type" and "Comments". The "Type" section has a dropdown menu with "PCR" selected, and a tooltip "Promotional Consignment Rate" is visible. The "Comments" section is a text area containing the text "Used to add a component for the current PCR deal". At the bottom right of the dialog, there are three buttons: "OK", "OK and Add Another", and "Cancel".

For a Clearance Consignment Rate type of deal, the 'Add Component' pop up can be used to add one or more components to the deal with the deal consignment rate specified.

Figure 4-10 Clearance Consignment Rate - Add Component

Add Component

* Type Clearance Consignment Rate

Consignment Rate %

Comments

OK OK and Add Another Cancel

Figure 4-11 Allowance - Add Component

Add Component

* Type Allowance Component Type

Threshold Value Type

Cost Apply Type

Deal in Price Cost ☐

Comments

OK OK and Add Another Cancel

6. In the **Type** field, select the component type.
7. In the **Threshold Value Type**, select the threshold value type. This field is used to capture the incentive type that would be received on attaining the threshold limit of the deal. The options are amount off per unit, percentage off per unit, get units for fixed price or buy/get free or discounted items.
8. For the deal, in the **Deal Class** field, select the way in which calculations would be performed in case of multiple deal components. The options are Cumulative, Cascade, or Exclusive.

Note

For a Bill Back, this field will default to Cascade and cannot be changed. For Vendor Funded Promotion and Vendor Funded Markdown, this field will default to Cumulative and cannot be changed.

For an Allowance Deal no Deal class can be defined.

9. In the **Cost Apply Type** field, select how the deal component is used to calculate future costs. The options are Net Cost, Net-Net Cost or Dead Net Cost. The details such as **Cost Apply Type** is defaulted to **Net Cost** and can be overridden.

Note

The value in this field is defaulted based on the type of deal you selected, but can be changed.

This Field will be defaulted to Net Cost in case of Allowance deal.

10. Select the following check boxes:
 - **Transaction Level Discount** - This check box applies to PO-specific off-invoice deals. If this check box is selected on the screen, the deal component applies to an entire PO, receipt or sale transaction. This field can only be selected if the vendor is a supplier. Because these deals apply to the entire order, items and locations are not added to transaction level deals.
 - **Calculate Income From Zero Threshold** - This check box is not applicable for off-invoice deals. This indicator is used in cases where the vendor has specified that a minimum threshold needs to be reached before a discount applies and when that threshold is reached, the discount applies against the entire threshold, including the level below the threshold.
 - **Deal in Price Cost** - This indicator defines whether the deal is to be used in the pricing cost calculation used by Price Management to determine the margin on the items linked with the deal.
11. In the **Comments** field, enter any additional comments as necessary.
12. Then choose one of the following options.
 - Click **OK** to add the deal component.
 - Click **OK and Add Another** to add more deal components.
 - Click **Cancel** to return to the Deal Page.

Promotions

While creating a Vendor Funded Promotion, the user can link the one or more promotions and specify the contribution value (percentage or amount) of the vendor for each of them using the 'Deal Component Promotions / Offers' pop up. These promotions need to have their start and end dates within the deal time frame and at least one offer that is not in the Completed or Cancelled status. Once a record is added to the table within the pop up, the user can either select to edit the contribution value or delete the record altogether.

Figure 4-12 Deal Component Promotions Pop-up - Vendor Funded Promotion

Deal Component Promotions / Offers

Deal Component 1 | Vendor Funded Promotion

Actions View + X [Calendar] [Filter] [Detach]

Promotion	Promotion Description	Offer	Offer Description	Vendor Contribution Type	Contribution
17931	.TEST_PROMO_1	17701	.TEST_OFFER_1	Percent	20.0000

OK Cancel

Figure 4-13 Add Promotion Pop-up - Vendor Funded Promotion

Add Promotion / Offer

Promotion

17371

▼

.TEST_PROMO_1

Offer

18371

▼

.TEST_OFFER_1

Contribution

Percent

▼

20

%

OK

OK and Add Another

Cancel

In case of the Promotional Consignment Rate type of deal, the user can link one or more promotions with their individual consignment rates to each component via the Add Promotion / Offer pop-up.

Figure 4-14 Deal Component Promotions/Offers

Deal Component Promotions / Offers				
Deal Component 1 Promotional Consignment Rate				
Actions ▾	View ▾	+	✕	📅
		✎	🗑	🔍
				🔗 Detach
Promotion	Promotion Description	Offer	Offer Description	Consignment Rate
81	Test Promo-1	101	Offer-1	10

Figure 4-15 Add Promotion/Offer

Add Promotion / Offer

Promotion

81

▼

Test Promo-1

Offer

101

▼

Offer-1

Consignment Rate

10

%

OK

OK and Add Another

Cancel

Deal Component Types

Deal component types are a required component while using the Deals functionality in Merchandising. All deals must have at least one component, and the types are a configurable way for retailers to classify the components added to a deal. New component types can be added as desired by implementation to configure the solution to meet your company's needs. The list of valid deal component types is defined by a configurable list of codes and descriptions, which are managed through spreadsheet download and upload processes. These processes are accessed through the main Merchandising task list under **Foundation Data > Download Foundation Data** and **Foundation Data > Upload Foundation Data**.

1. Select the **Price and Cost** template type from the Download Data screen.
2. Select the Deal Component Types template.
3. Click the Download button.
4. When prompted do one of the following:

- Open the .ods file.
- Save the file, then open it in the spreadsheet application of your choice.

Once opened, there are two sheets that can be modified:

- **Deal Component Types** - This is where new types can be created, and existing types can be updated or deleted.
- **Deal Component Type TL** - This is where translated values can be created, updated, or deleted.

Add a Deal Component Type

To add a new deal component type:

1. Open the **Deal Component Types** tab.
2. Select the **Create** action type in a blank line.
3. Enter the **Description** for the component type in the primary language (up to 250 characters).

Note

The primary language is defined in the Merchandising system options.

4. Enter a unique code for the deal component type (up to 2 digits).
5. If necessary, add descriptions in other languages:
 - a. Select the **Deal Component Type TL** tab.
 - b. Select the **Create** action type in a blank line.
 - c. Enter the language for the translated description.
 - d. Enter the code for the new deal component type.
 - e. Enter the translated description (up to 250 characters).

Update a Deal Component Type

If you would like to update any details for existing deal component types, a similar process will be followed as that described above for creating new deal component types. First, download the spreadsheet, and then navigate to the tab where you would like to make your updates.

The following columns can be updated in each tab:

- **Deal Component Types** - Description
- **Deal Component Type TL** - Description

To update a reason:

1. Select the **Update** action type in the row to update.
2. Enter the correct description.

Delete a Deal Component Type

To delete a deal component type that is no longer used by your business, select **Delete** in the action column for each row to delete. Do this in both the **Deal Component Types** and **Deal Component Type TL** tabs.

Note

You cannot delete a deal component type that is currently associated with a deal. You will get an error if this occurs when the changes are uploaded.

Upload Changes

Once all updates have been made to the data in the spreadsheet, upload the spreadsheet to Merchandising:

1. Save the file and close it.
2. Return to the Merchandising screens.
3. Select **Foundation Data > Upload Foundation Data** from the main task list.
4. Select the **Price and Cost** template type.
5. Select the **Deal Component Types** template.

This automatically generates a process description. This can be updated, if desired.

6. Select and upload the file:
 - a. Click the **Browse** button.
 - b. Navigate to the directory where you saved the spreadsheet.
 - c. Select the file.
 - d. Click **Upload**.

The spreadsheet is uploaded and entered into Merchandising.

To review the status of the upload and check whether any errors occurred, select the **Foundation Data > Review Status** task from the main task list.

For more information about uploading data through a spreadsheet, see "[Data Upload](#)" in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

Add Buy/Get Details

The Buy/Get Item pop-up is only enabled if Threshold Value Type selected is Buy/Get free or discounted items for off-invoice deals.

Add Buy/Get Item

To add buy/get item:

1. Click **Buy/Get Item** from the Components section. The Buy/Get Item pop-up appears.

Figure 4-16 Buy/Get Item Pop-up

Buy/Get Item

Buy

Item

Threshold Target Quantities

Item

Purchase Order

Location

Recurring for All Buy Quantity ☐

Get

Type

Item

Unit Cost USD

Discount

Discount Apportion %


Threshold Quantity

2. The Buy/Get Item pop-up consists of the following three sections:
 - **Buy**
 - In the **Item** field, enter or search an item using the search icon. It identifies the item that must be purchased for a quantity threshold-type discount.
 - **Threshold Target Quantities**
 - In the **Item** field, enter an item threshold target quantity for the buy item that must be ordered to qualify for the free item.
 - In the **Purchase Order** field, enter the threshold target quantity for all locations on the purchase order which the buy item is part of. This is the target level that will be used for future calculation of net cost.
 - In the **Location** field, enter threshold target quantity which is the average targeted purchase level per location on the deal. This value will be used in future cost calculations.
 - Select the **Recurring for All Buy Quantity** check box. This indicates if the quantity threshold discount is only for the first buy amount purchased (example, for the first ten purchased, get one free), or if a free item will be given for every multiple of the buy amount purchased on the order (example, for every ten purchased, get one free).
 - **Get**

- In the **Type** field, select the Get type from the list. Valid options are free, percent, amount or fixed amount.
 - In the **Item** field, enter or search for an item using the search icon. This identifies the get item for a quantity threshold-type (buy/get) discount.
 - In the **Unit Cost** field, enter the amount. This will be enabled if the Get type selected is Free and identifies the unit cost of the threshold free item that will be used in calculating the prorated quantity discount. It will default to the item/supplier cost, but can be modified based on the agreement with the supplier.
 - In the **Discount** field, enter a value. This will be enabled in case Get type is not 'Free'. It will be percent in case get type is Percent otherwise value.
 - In the **Discount Apportion %** field, enter a value. This specifies the percentage of the total discount that should be apportioned from the get items unit cost for off invoice deals where buy item is not the same as the get item and Get type is Free. The remaining will be apportioned from the buy item unit cost.
 - In the **Threshold Quantity** field, enter a value. This identifies the quantity of the identified get item that will be given at the specified get discount if the buy amount of the buy item is purchased.
3. Click **OK** to add the buy/get item information.
 4. Click **Cancel** to return to the Deal page.


Edit a Deal Component

To edit a deal component:

1. Select the deal component you want to edit.
2. From the Actions menu, click **Edit** or click the Edit icon  .
The Edit Component pop-up appears.
3. Edit the enabled fields as necessary.
4. Click **OK** to return to Deal page.
5. Click **Save** or **Save and Close** to save the changes.

Delete a Deal Component

To delete a component:

1. Select the deal component you want to delete.
2. From the Actions menu, click **Delete** or click the Delete icon  .
You are prompted to delete the deal component.
3. Click **Yes** to confirm deletion.
4. Click **Save** or **Save and Close** to save the changes.

Add Items and Locations

On the Item/Locations section, you can select the items to which the deal components are applied. You can also specify specific locations for the items. Items and items at specific locations can also be excluded from deal component.

The item/location information is set up per component.

Item/Locations - View Menu and Icons

You can customize the view of the table by using the options in the View Menu. For information about this menu, see below and see "[View Menu](#)" in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

Figure 4-17 Item/Locations - View Menu

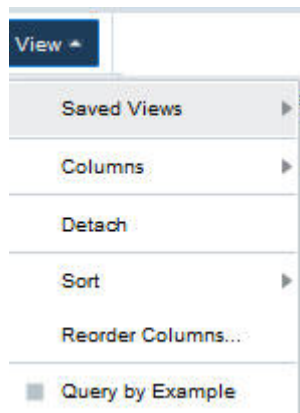


Table 4-3 Item/Locations - View Menu/Icons and Description

View Menu List	Description
Saved Views	Saved views are predefined arrangement of table columns to provide certain specific information by using default and optional columns and is different from the default view. The views available are Merchandise Hierarchy, Organization Hierarchy, and Item Level. For every record you can choose respective saved view to see information related to merchandise hierarchy, organization hierarchy, or item level.

Add the Item/Locations to a Deal

You can add item/locations to a deal component while creating or editing in the Deal page.

To add the item/locations of a deal:

1. From the Tasks menu, select **Deals > Create Deal**. The Create Deal pop-up appears.
2. Enter the relevant data and click **OK** to save the changes. The Deal page appears.
3. In the Deal page, go to Item/Locations section.

Figure 4-18 Item/Locations Section

Merchandise Level	Division	Group	Department	Class	Subclass	Item	Item Description	Country of Sourcing	Excluded
Department	2	20	2010					US	—


4. From the Actions menu, click **Add** or click the Add icon . The Include/Exclude Item/Location pop-up appears

Figure 4-19 Include/Exclude Item/Location Pop-up

Include / Exclude Item / Location

☒ Include ☐ Exclude

Item

Merchandise Level ▼

☒ Item ☐ Item List

Item 🔍

Location

Organization Level ▼

☒ Store ☐ Warehouse ☐ Location List

Store ▼


OK OK and Add Another Cancel

5. Select the include or exclude option to determine if the record is being created for inclusion or exclusion.
6. In the Item section, select the merchandise level from the Merchandise Level list. Choose the appropriate option to add an item by Item or Item List.
7. In the Location section, select the organizational level from the Organizational Level list. Choose the appropriate option to add location by Store, Warehouse, or by Location List.
8. Then choose one of the following options.
 - Click **OK** to add the item/location.
 - Click **OK and Add Another** to add more item/locations.

- Click **Cancel** to return to the Deal Page.

Delete an Item/Location

To delete an item/location:

1. Select the item/location you want to delete.
2. From the Actions menu, click **Delete** or click the Delete icon .
You are prompted to delete the deal component.
3. Click **Yes** to confirm deletion.
4. Click **Cancel** to retain the record.

Add Thresholds and Discounts

On the Thresholds section, you can specify the lower and upper limits that need to be reached in order to receive the benefits that are defined as part of the current deal. Multiple thresholds or bands can be defined for a deal. If the threshold value type that was defined for the deal component is set to Amount Off, you have the option to select whether the specified amount needs to be applied per unit or as a total value for the entire threshold band. For example, a vendor might offer the retailer a discount of \$1 per unit or a total discount of \$50 on buying in excess of 100 quantities. Each component added to the deal can be used as the target level around which cost calculations need to take place. You must indicate the threshold band that is to be treated as the targeted level for a deal component. This threshold band is then used for the future cost and pricing cost calculations.

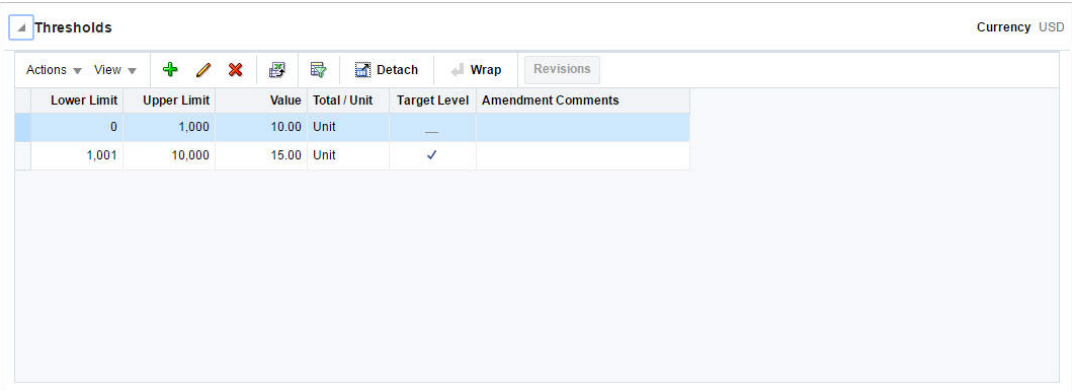
Add the Thresholds of a Deal

You can add thresholds to a deal component while creating or editing in the Deal page.

To add the thresholds of a deal:

1. From the Tasks menu, select **Deals > Create Deal**. The Create Deal pop-up appears.
2. Enter the relevant data and click **OK** to save the changes. The Deal page appears.
3. In the Deal page, go to Thresholds section.

Figure 4-20 Thresholds Section



Thresholds						Currency USD	
Actions	View						
Lower Limit	Upper Limit	Value	Total / Unit	Target Level	Amendment Comments		
0	1,000	10.00	Unit	—			
1,001	10,000	15.00	Unit	✓			


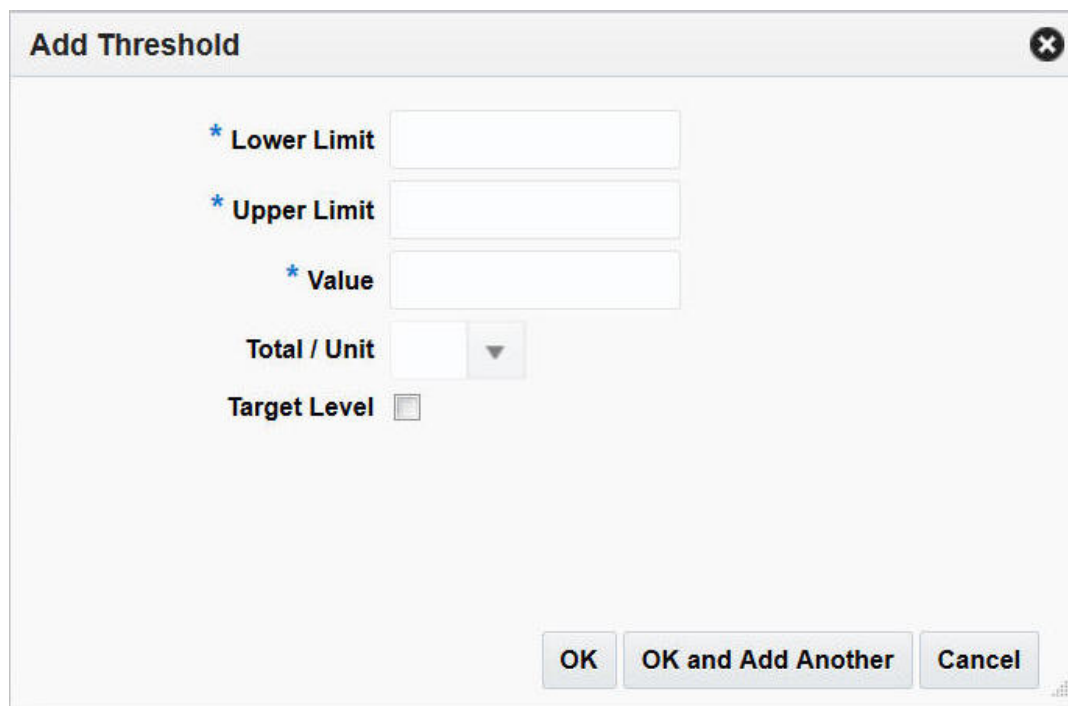
4. From the Actions menu, click **Add** or click the Add icon . The Add Threshold pop-up appears.

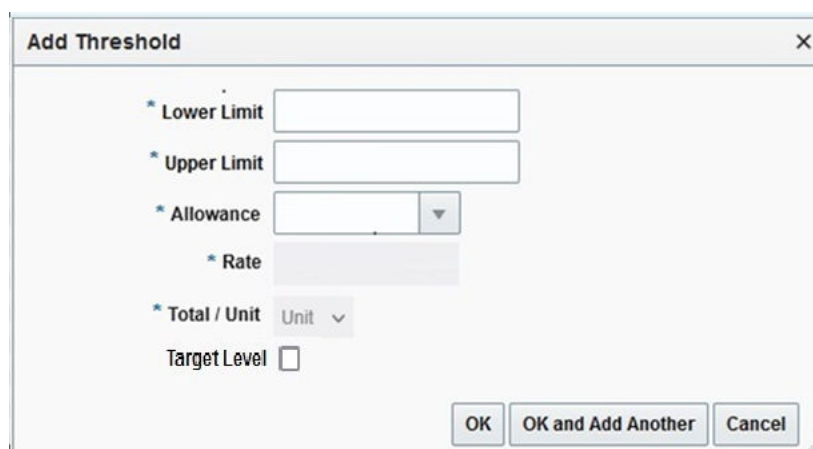
Figure 4-21 Add Threshold Pop-up



The "Add Threshold" pop-up dialog box contains the following fields and controls:

- * Lower Limit**: Text input field.
- * Upper Limit**: Text input field.
- * Value**: Text input field.
- Total / Unit**: Text input field with a dropdown arrow.
- Target Level**: Check box.
- Buttons: **OK**, **OK and Add Another**, and **Cancel**.

Figure 4-22 Allowance Deal: Add Threshold Pop-up



The "Add Threshold" pop-up dialog box for an allowance deal contains the following fields and controls:

- * Lower Limit**: Text input field.
- * Upper Limit**: Text input field.
- * Allowance**: Text input field with a dropdown arrow.
- * Rate**: Text input field.
- * Total / Unit**: Text input field with a dropdown arrow.
- Target Level**: Check box.
- Buttons: **OK**, **OK and Add Another**, and **Cancel**.

In case the Threshold Value Type at Deal component level is set to **Amount off** then the only allowance components with specific amount can be displayed.

Figure 4-23 Allowance Deal set up as Amount: Add Threshold Pop-up

The 'Add Threshold' pop-up window displays the following fields and values:

- Lower Limit:** 0
- Upper Limit:** 100
- Allowance:** MKT_ALLOW (Marketing Allowance)
- Rate:** 10.0000 (USD per EA)
- Total / Unit:** Unit
- Target Level:** ☐

Buttons at the bottom: OK, OK and Add Another, Cancel.

In case the Threshold Value Type at Deal component level is set to **Percentage off** then the allowance components with specific rate can be displayed.

Figure 4-24 Allowance Deal set up as Percentage: Add Threshold Pop-up

The 'Add Threshold' pop-up window displays the following fields and values:

- Lower Limit:** 0
- Upper Limit:** 100
- Allowance:** FRT_ALLOW (Freight Allowance)
- Rate:** 10.0000 (%)
- Total / Unit:** Unit
- Target Level:** ☐

Buttons at the bottom: OK, OK and Add Another, Cancel.


5. In the **Lower Limit** field, enter the value of the lower limit of the deal component. This is the minimum value that must be met in order to get the specified discount. This value will be either a currency amount or quantity value, depending on the threshold limit type of this deal component.
6. In the **Upper Limit** field, enter the value of the upper limit of the deal component. This is the maximum value for which the specified discount will apply. This value will be either a

currency amount or quantity value, depending on the threshold limit type of this deal component.

7. In the **Value** field, enter the value of the discount that will be given for meeting the specified thresholds for this deal component. This value will be either a currency amount or quantity value, depending on the threshold limit type of this deal component.
8. In the **Total/Unit** field, select the total or unit. It indicates if the value for deal components for which the threshold type is amount off is amount off by unit or in total.
9. Select the Target Level check box. This indicates if a threshold level is the targeted purchase or sales level for a deal component. This indicator will be used for cost calculations.
10. Click **OK** to add thresholds. You can add more thresholds by clicking **OK and Add Another**.
11. Click **Cancel** to return to the Thresholds section.


Edit the Threshold of a Deal

To edit the threshold of a deal:

1. Select the threshold you want to edit.
2. From the Actions menu, click **Edit** or click the Edit icon  .
The Edit Threshold pop-up appears.
3. Edit the enabled fields as necessary.
4. Click **OK** to return to Deal page.
5. Click **Save** or **Save and Close** to save the changes.

Delete the Threshold


To delete the threshold:

1. Select the threshold you want to delete.
2. From the Actions menu, click **Delete** or click the Delete icon  .
You are prompted to delete the record.
3. Click **Yes** to confirm deletion.
4. Click **Save** or **Save and Close** to save the changes.

Create a Purchase Order-specific Deal

You can also create PO specific deals. To create a PO-Specific Deal, follow the steps listed below.

1. From the Tasks menu, select **Manage Orders**. The Order Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.

4. In the Order column, click the order link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Order page appears.
5. In the Orders toolbar, click **Details**. The Order Details page appears.
6. In the Order Details toolbar, select **More Actions > PO-Specific Deal**. The Create Deal pop-up appears.
For more information about the Create Deal pop-up, see the [Create a Deal](#) section.
7. In the **Threshold Limit Type field**, select how the threshold is defined.
8. Click **OK** to save any changes. The Deal page appears.

Manage Deals

You can access the option to manage deal from the Tasks menu. Managing deals involves performing one or more of the following tasks:

- Searching for a deal
- Creating a deal
- Creating from an existing deal
- Editing a deal
- Viewing a deal

On clicking the Manage Deal link by selecting **Deals > Manage Deal**, the Deal Search page appears.

In the Deal Search page you can search for deals by specifying various search criteria. You can choose to access deals in the search results in edit or view mode depending on security privileges. There are also options for creating a new deal or creating a new deal from existing.

The Deal Search page includes the following sections:

- Search

For more information on the Deal Search page, see the [Search for a Deal](#) section.

- [Results](#)
- [Deal Search Toolbar](#)

Figure 4-25 Deal Search Page

Deal Search

Search

Deal

Deal Type

Status

Billing Type

Vendor Type

Vendor

Active Date

Close Date

Advanced Saved Search Default

Search Reset Save...

Results

Actions View

Grid

Pencil

EYE

Print

Filter

Detach

Deal	Vendor	Vendor Name	Status	Billing Type	Active Date	Close Date
25001	2100	Del Monte Foods	Approved	Vendor Funded Promotion	4/11/19	4/30/19
30001	2100	Del Monte Foods	Worksheet	Vendor Funded Markdown	3/25/19	3/27/19
35001	2300	Coca Cola	Approved	Vendor Funded Promotion	3/25/19	5/23/19
40001	2300	Coca Cola	Worksheet	Off-Invoice	5/2/19	
40014	2100	Del Monte Foods	Worksheet	Vendor Funded Promotion	5/2/19	5/29/19
40015	2300	Coca Cola	Approved	Vendor Funded Promotion	5/2/19	5/30/19
40016	2300	Coca Cola	Worksheet	Vendor Funded Promotion	5/2/19	5/29/19
60001	2300	Coca Cola	Approved	Vendor Funded Markdown	4/10/19	6/24/19
65001	2300	Coca Cola	Worksheet	Bill Back	6/6/19	6/30/19
85001	2300	Coca Cola	Worksheet	Vendor Funded Promotion	6/11/19	6/30/19
90001	2300	Coca Cola	Worksheet	Vendor Funded Markdown	6/14/19	6/30/19
90002	2300	Coca Cola	Worksheet	Vendor Funded Promotion	6/26/19	6/30/19
95001	2300	Coca Cola	Approved	Vendor Funded Markdown	4/11/19	4/30/19
115002	2300	Coca Cola	Worksheet	Vendor Funded Markdown	4/12/19	4/29/19

Columns Hidden 8

Total Records:

Search for a Deal

To search for a deal:

1. From the Tasks menu, select **Deals > Manage Deal**. The Deal Search page appears.
2. You can search for a deal by providing search criteria in the search section. The criteria can be provided either in Basic or Advanced mode, depending on the requirement. Basic is the default mode when the search page is entered. Click **Advanced** to access the search panel in advanced mode. You can return to Basic mode by clicking **Basic**.

Search for a Deal Through the Basic Search Criteria

To search for a deal through the basic search criteria:

1. Enter or select one or all of the following basic search criteria.

Table 4-4 Deal Search - Basic Search Criteria

Fields	Description
Deal	Enter the deal ID.
Deal Type	Select the deal type. The options are: Annual, Promotional, and PO Specific.
Status	Select the status of the deal. The options are: Worksheet, Submitted, Approved, Rejected, Closed.
Billing Type	Select the type of deal being created. The options are: Off Invoice, Allowance, Bill Back, Bill Back Rebate, Vendor Funded Promotion, Vendor Funded Markdown, Promotional Consignment Rate and Clearance Consignment Rate.
Vendor Type	Select the vendor type.

Table 4-4 (Cont.) Deal Search - Basic Search Criteria

Fields	Description
Vendor	Enter, select or search for the vendor.
Active Date	Enter the date on which the deal becomes active or click the calendar icon and select the date.
Close Date	Enter the date on which the deal ends or click the calendar icon and select the date.

2. You can also click the Saved Search drop down to select one of the saved sets of search criteria. Selecting a saved search will populate the criteria section with saved criteria. If the saved search is selected to run automatically then the search will be executed too.

You can also choose to manage and personalize the saved searches by clicking **Personalize** in the list. The Personalize Saved Searches page appears.

For more information on the Personalize Saved Searches, see [Personalize Saved Search](#) in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

3. Click **Search**. The deals that match the search criteria are displayed in the Results section.
4. Click **Search**. The deals that match the search criteria are displayed in the Results section.
5. Click **Reset** to execute the saved search.
6. Click **Save**. to save the current set of search criteria as a Saved Search. The Create Saved Search pop-up appears.

For information on the Create Saved Search pop-up, see [Create Saved Search](#) in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

7. Click **Done** to close the pop-up.

Search for a Deal Through the Advanced Search Criteria

To search for a deal through the advanced search criteria:

1. Enter or select one or all of the following advanced search criteria.

Table 4-5 Deals Search - Advanced Search Criteria

Fields	Description
Deal	Enter the deal ID.
Deal Type	Select the deal type. The options are: Annual, Promotional and PO Specific.
Status	Select the status of the deal. The options are: Worksheet, Submitted, Approved, Rejected, Closed.
Billing Type	Select the type of deal being created. The options are: Off Invoice, Allowance, Bill Back, Bill Back Rebate, Vendor Funded Promotion, Vendor Funded Markdown, Promotional Consignment Rate and Clearance Consignment Rate.
Vendor Type	Select the vendor type.
Vendor	Enter, select or search for the vendor.
Active Date	Enter the date on which the deal becomes active or click the calendar icon and select the date.

Table 4-5 (Cont.) Deals Search - Advanced Search Criteria

Fields	Description
Close Date	Enter the date on which the deal ends or click the Calendar icon and select the date.
External Ref. No.	Enter the external reference number.
Order No.	Enter, select or search for the order number.
Deal Component Type	Select the deal component type.
Rebate	Select Yes if the rebate is included in the deal or select No if the rebate is not included in the deal.
Promotion	Enter, select or search for the promotion from the list.
Division	Enter the division number, select or search for the division name and number.
Group	Enter the group number, select or search for the group name and number from the list.
Department	Enter the department number, select or search for the department name and number from the list.
Class	Enter the class number, select or search for the class name and number from the list.
Subclass	Enter the subclass number, select or search for the subclass name and number from the list.
Item	Enter the item number, or search by using the search icon.
Chain	Enter the chain number, select or search for the chain name and number from the list.
Area	Enter the area number, select or search for area name and number from the list.
Region	Enter the region number, select or search for the region name and number from the list.
District	Enter the district number, select or search for the district name and number from the list.
Location	Enter the location number, select or search for the location name and number from the list.

Figure 4-26 Search Section in Advanced Search Mode

2. To narrow down the search, use the list next to the search fields. For example, determine if the entered value should equal or not equal the search result.
3. Click on the Saved Search list to select one of the saved search criteria. Selecting a saved search populates the search section with the saved search criteria. If the run automatically function is enabled for the search, the search is executed immediately.

You can also personalize your saved searches by selecting **Personalize**. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see [Personalize Saved Search](#) in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

4. Click **Search**. The deals that match the search criteria are displayed in the Results section.
5. Click **Reset** to clear the search section and results.
6. Click **Save As...** to save the current search criteria. The Create Saved Search pop-up appears.

For more information about how to save your search criteria, see [Create Saved Search](#) in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

7. Click **Done** to close the page.

Results


The Results section lists the retrieved deals.

Deal Search Toolbar

For information about the toolbar, see "[Screen Level Action - Icons and Buttons](#)" in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

Edit a Deal

To edit a deal, follow the steps below.

1. From the Tasks menu, select **Deals > Manage Deal**. The Deal Search page appears.
2. Select the deal you want to edit.
3. Select **Actions > Edit**, or click the Edit icon . The Deal page appears in Edit mode.
4. Make the necessary changes and click **Done** to save the changes.


View a Deal

To view a deal, follow the steps below.

1. From the Tasks menu, select **Deals > Manage Deal**. The Deal Search page appears.
2. Enter additional criteria as desired to make the search more restrictive.
3. Select the deal you want to view.
4. Click **Done** to close the page.

Create a Deal

To create a deal, follow the steps below.

1. From the Tasks menu, select **Deals > Manage Deal**. The Deal Search page appears.
2. From the Actions menu, select **Create** or click the Create icon . The Create Deal page appears.

For more information on how to create a deal, see the [Create a Deal](#) section

Deal Toolbar

For information about the toolbar, see “[Screen Level Action - Icons and Buttons](#)” in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

Deal - More Actions Menu

Use the More Actions menu to navigate to the following pages. The More Actions menu contains the following options.

Figure 4-27 Deal - More Actions Menu

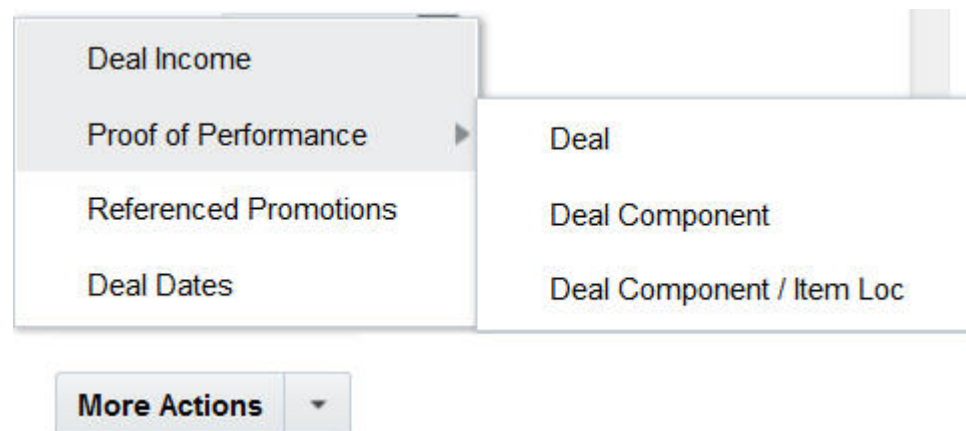


Table 4-6 Deal - More Actions Menu and Description

Action Buttons	Description
More Actions	<p>You can navigate to open the following pop-ups by clicking More Actions menu:</p> <p>You can navigate to the following pop-ups from the More Actions menu:</p> <ul style="list-style-type: none">• Deal Income By clicking the Deal Income, the Deal Performance appears.• Proof of Performance You can access the Proof of Performance pop-up at the following levels:<ul style="list-style-type: none">– Deal– Deal Component– Deal Component /Item Loc• Manage Referenced Promotions• View Deal Dates

Approve a Deal

Change the Status of a Deal

When a deal is added to the system, it must go through a series of checks before it is accessible in the system. Depending on your user role, you may not be able to move the deal to the next status. A deal may be in any of the following statuses:


Table 4-7 Deals Approval Process Status

Status	Definition
Worksheet	The deal creation has been started, but not completed.
Submitted	The deal has been completed and is pending review.
Approved	The deal has been reviewed and has been approved.
Rejected	The deal has been submitted, reviewed, and has been rejected.
Closed	The deal is complete.


Submit a Deal

You can submit a deal when a deal is created and the deal is in Worksheet status.

To submit a deal:

1. From the Tasks menu, select **Deals > Create Deal**. The Create Deal pop-up appears.
2. Click **OK** to save any changes. The Deal page appears.
3. In the Components section, select **Actions > Add** or click the Add icon .
The Add Component pop-up appears.

4.

 **Note**


You need to enter the required information in the following sections before submitting a deal:

 - Components
 - Item/Locations
 - Thresholds
5. Enter all the required information and click **Submit** on the page level toolbar. The deal status changes to **Submitted**.
6. Click **Save** to save your changes or click **Save and Close** to save and close the page.
7. Click **Cancel** to discard the changes and close the Deal page.


Approve a Deal

The status of a deal changes as it passes through an approval process. Depending on your user role, you can change the status of a deal. The status can be Worksheet, Submitted, Approved, Rejected, or Closed. A deal is not effective until it is approved.

To approve a deal:

1. From the Tasks menu, select **Deals > Create Deal**. The Create Deal pop-up appears.
2. Click **OK** to save any changes. The Deal page appears.
3. In the Components section, select **Actions > Add** or click the Add icon . The Add Component pop-up appears.

4.

 **Note**

You need to enter the required information in the following sections before submitting a deal:


 - Components
 - Item/Locations
 - Thresholds
5. Enter all the required information and click **Submit** on the pop-up level toolbar. The deal status changes to **Submitted**.
6. Click **Approve**. The status changes to **Approved**.
7. Click **Save** to save your changes or click **Save and Close** to save and close the pop-up.
8. Click **Cancel** to discard the changes and close the Deal page.

Reject a Deal

To reject a deal:

1. From the Tasks menu, select **Deals > Manage Deal**. The Deal Search page appears.
2. In the Status field, select the deal in Submitted status and click **Search**.

The deals that are in Submitted status are displayed in a table in the Results section.

3. Select the deal that you wish to reject.
4. Select **Actions** > **Edit** or click the Edit icon . The Deal page appears.
5. Click **Reject**. The status changes to **Reject**.
6. Click **Save** to save your changes or click **Save and Close** to save and close the page.
7. Click **Cancel** to return to the Deal Search page.

Close a Deal

It is necessary to close any active deal which is present in the system on or after its close date. A daily batch scrutinizes all deals that are currently active and closes the deals that match this criterion. The closed deals would still be available within the application for audit purposes, but will not be applied to any matching transaction or processed by any batch programs for income generation.

Add Comments to a Deal

To add comments to a deal:

1. In the Comments section, enter your comments.

Figure 4-28 Comments Section



2. Click **Save** to save your changes or click **Save and Close** to save and close the page.
3. Click **Cancel** to discard the changes and close the page.

Deal Performance

The Deal Performance page allows you to maintain forecasts for a deal, view period by period performance, and compare the actual deal performance against the actual forecasts.

As actuals are accrued, you can view the actual performance of the deal, at the component level, against the forecasted performance of the deal.

View Deal Performance Page

To view deal performance:

1. From the Tasks menu, select **Deals** > **Create Deal**. The Create Deal page appears.
2. Enter the relevant data and click **OK** to save the changes.
The Deal page appears.
3. From the More Actions menu, click **Deal Income**.

The Deal Performance page appears, which includes Total and Periods section. For more information on Total and Periods, see the [Totals](#) and the [Periods](#) section.

Figure 4-29 Deal Performance Page

Deal Performance Header

The Deal Performance Header includes the following fields.

Table 4-8 Deal Header - Fields and Description

Fields	Description
Title	The title displays Deal ID to the top left of the head container. The Deal Status and the Currency is displayed with a separator between them to the top right of the head container. The deal number is populated by default.
Deal Status	The description of the deal status is displayed as text. If you create a deal the status is Worksheet. For more information on deal status, see the Change the Status of a Deal section.
Vendor	This field displays the type of vendor, vendor ID, and name.
Reporting Period	The deal reporting level determines the length of the reporting periods that would be created for income generation. The options provided depends on the calendar type that is being used in the Merchandising instance. For a 4-5-4 calendar, this can be Week, Month, or Quarter, while for a Gregorian calendar, only Month, or Quarter can be selected. Income is calculated once per reporting period. The reporting level also indicates the maximum frequency at which an invoice is raised against the income accrued by the deal. If quarterly processing is chosen, based on the end date for the deal, Merchandising may change the date of the final reporting period to an end of month date instead, if the end of the quarter is more than a month away, to allow for faster income realization. For example, if the end date of the deal is set for 17-Jan, but the end of the quarter is 30-Mar, Merchandising changes the last reporting period to 26-Jan, which is the nearest end of month date.
Billing Period	This field displays the time period for which invoice would be raised for the deal.
Turnover Measure	This field displays whether the turnover from the deal would be measured in quantity or value terms.

Table 4-8 (Cont.) Deal Header - Fields and Description

Fields	Description
Activated Date	The activated date is the day from which the deal starts to be applied within the system.
Closed Date	The close date is the last day of the deal. This is required only for promotional deals.
Estimated Next Bill Date	The Estimated next invoice date gets populated initially based on the Bill Back period. It takes the last day of the period that will be invoiced. After the invoicing batch program Vendor Deal Invoicing (vendinvc) runs, this date is updated with a Gregorian week, month, or quarter, or the 4-5-4 week setup based on the calendar configuration in the system. This date can be modified throughout the deal's lifetime, even after approval until the last invoice against the deal has been processed.

Totals

The Total section displays the turnover and income values for deal components for all the valid periods. For turnover it has baseline, budget and actual values. It also shows if turnover totals are designated fixed for distribution among periods. For income it shows budget, actual/trend and actual/forecast values. In addition, it also shows Budget Growth %, Total Turnover and Actual Monies Earned with respect to total deal to date.

Edit a Total of a Deal Component

To edit total of a deal component:

1. From the More Actions menu, click **Deal Income**. The Deal Performance page appears, which includes the Total section.

Figure 4-30 Total Section

▲ Total

Actions ▾ View ▾		Turnover						Income			Deal to Date	
Component	Description	Baseline	Budget	Budget Fixed	Actuals / Forecast	Actuals / Forecast Fixed	Actuals / Trend	Budget	Actuals / Forecast	Actuals / Trend	Budget Growth %	Total Turnover
1	Other component	0.00	0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00	0.00	0.00	0.00	0.00	0.00
		0.00	0.00		0.00		0.00	0.00	0.00	0.00	0.00	0.00


2. From the Actions menu, click **Edit** or click the Edit icon . The Edit Components Total pop-up appears.

Figure 4-31 Edit Component Total Pop-up

3. In the **Baseline** field Turnover sub section, enter or edit the previous year's turnover.
4. In the **Budget** field Turnover sub section, enter or edit the expected amount of turnover.
5. In the **Actuals/Forecast** field Turnover sub section, enter or edit the actuals or forecast amount.
6. When the budget turnovers are set, select the **Fixed** check box to the right of the Budget field. Setting the budget **Fixed** signifies that the total value for the component will remain fixed despite any change in the value specific to any period. Any change will be divided over the other periods. If this is selected than you will not be able to apply growth % over the baseline to populate budget.

Note

Fixed can be checked against Actual/Forecast as well.

7. In the **Target Baseline Growth %** field, enter the percentage you expect the baseline to grow.
8. Click **Apply Growth%**.
9. Click **OK** to save any changes and close the pop-up.
10. Click **Cancel** to discard the changes and close the pop-up.

Note

Once a deal is approved, you can change only forecast values. Before that Baseline can also be changed.

This applies for both total and periods section.

Periods

The periods table shows the performance data for deal components broken down by deal reporting periods. The period end column displays the end date of the deal reporting period. You can enter or edit budgeted and baseline turnover for a particular period in this table. You can also view the income generated till the last batch run in the Income to Date column in this table for the period that is currently open by clicking on the Income to Date button.

Periods - Actions Menu and Icons

Use the Actions Menu and icons to apply actions to the table. You can perform actions listed below, as well as the actions described in the ["Action Menu and Icons"](#) section in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

Figure 4-32 Periods - Actions Menu and Icons

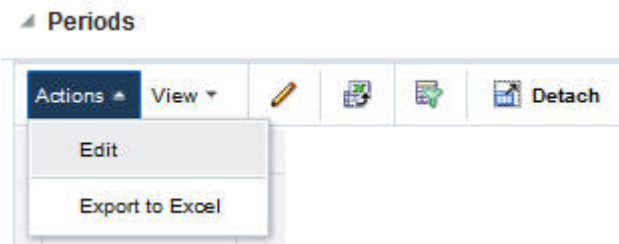


Table 4-9 Periods - Actions Menu/Icons/Buttons and Description






Actions Menu/Icons/Buttons	Description
Copy Baseline Turnover to Budget button	The Copy Baseline Turnover to Budget action button on the Periods table toolbar copies the Baseline Turnover to the budget turnover.
Income to Date button	The Income to Date action button on the Periods table toolbar calculates the total income generated at a component level until the last income calculation processing for Bill Back and Bill Back Rebate deals for the current period where the end date has not yet arrived

Edit Periods of a Deal Component

To edit periods of a deal component:

1. From the More Actions menu of the Deals page, click **Deal Income**. The Deal Performance page appears, which includes the Periods section.

Figure 4-33 Periods Section

Periods									
Actions View     Copy Baseline Turnover to Budget Income to Date									
Period End 	Turnover				Income				
	Baseline	Budget	Actuals / Forecast	Actuals / Trend	Budget	Actuals / Forecast	Actuals / Trend	Actuals	Income to Date
6/1/24	0.00	0.00	0.00	0.00	0.00	0.00	110.00	<input checked="" type="checkbox"/>	110.00
6/8/24	0.00	0.00	0.00	0.00	0.00	0.00	245.00	<input checked="" type="checkbox"/>	245.00
6/15/24	0.00	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>	96.00
6/22/24	0.00	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>	0.00
6/29/24	0.00	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>	0.00



2. From the Actions menu, click **Edit** or click the Edit icon  . The Edit Period pop-up appears.

Figure 4-34 Edit Period Pop-up

Edit Period 

Period End 4/2/18

Turnover

Baseline0.000

Budget0.000

Actuals / Forecast0.000

Fixed☐

Fixed☐

OK

Cancel

3. In the **Baseline** field Turnover sub section, enter or edit the previous year's turnover.
4. In the **Budget** field Turnover sub section, enter or edit the expected amount of turnover.
5. In the **Actuals/Forecast** field Turnover sub section, enter or edit the actuals or forecast amount.
6. The total check boxes are view only. They would be checked if the totals for them have been checked fixed in the totals table.
7. Click **OK** to save any changes and close the pop-up.
8. Click **Cancel** to discard the changes and close the pop-up.

Proof of Performance

You can access the Proof of Performance page from the Deals page, **More Actions > Proof of Performance**. You can access Proof of Performance (POP) page at one of the following levels through the POP sub menu:

- Deal
- Deal Component
- Deal Component/Item Loc

The POP page is used to define the performance requirements at the deal level, component level, or at the item/location level. This allows the buyer to identify what needs to be done in order to receive the deal discount, which might be an advertisement, coupon distributions or 'in store' demonstrations of the product. POP terms are used only for informational purposes in Merchandising.

View/Create/Edit Proof of Performance Page

You can select the level at which you want to view, create, or edit for Proof of Performance definitions and fulfillment information. The options are: Deal, Deal/Component, Deal Component Item/Loc.

To view/create/edit proof of performance:

1. From the Tasks menu, select **Deals > Create Deal**. The Create Deal pop-up appears.
2. Enter the relevant data and click **OK** to save the changes. The Deal page appears.
3. From the More Actions menu of the Deal page, click **Proof of Performance**, and then click **Deal** or **Deal Component** or **Deal Component/Item Loc** depending on which level you want to define proof of performance.

The Proof of Performance page appears, which includes Terms Definition and Fulfillment sections.

For more information on Terms Definition and Fulfillment, see the [Add Proof of Performance Terms Definition](#) and the [Add Proof of Performance Fulfillment](#) section.

Figure 4-35 Proof of Performance Page

Deal 405001 Supplier 77834 | Supplier Ref. No. Worksheet | USD

Terms Definition

Type	Duration	Duration Type	Recommended Dates		Planned Dates		Comments
			Start	End	Start	End	
No data to display.							

Fulfillment

Promotion	Description	Dates		Comments
		Start	End	
No data to display.				

Save Save and Close Cancel

Proof of Performance Header

The Proof of Performance Header includes the following fields.

Table 4-10 Proof of Performance Header - Fields and Description

Fields	Description
Title	The title displays Deal ID and Deal Number to the top left of the head container. The Deal Status and the Currency is displayed with a separator between them to the top right of the head container. The deal number is populated by default. The supplier number, name, and the reference number are displayed.

Manage Terms

The Terms Definition section is used to define Proof of Performance terms for a given deal at deal, deal component or deal item-loc combination levels. These terms are defined by the deal partner that offers the deal.

Add Proof of Performance Terms Definition

To add terms proof of performance definition:

- 1. From the More Actions menu of Deals page, click **Proof of Performance**, and then click **Deal Performance**.

The Proof of Performance page appears, which includes the Terms Definition section.


- 2. From the Actions menu, click **Add** or click the Add icon  . The Add Terms pop-up appears.

Figure 4-36 Add Terms Pop-up

The 'Add Terms' pop-up window is designed for adding performance terms. It includes the following fields and controls:


- Type:** A dropdown menu to select the type of performance term.
- Duration:** A text input field for the duration of the term.
- Duration Type:** A dropdown menu to select the period of time for compliance.
- Deal Ref. Item:** A text input field with a search icon to find a deal reference item.
- Dates:** A section with two columns: 'Recommended' and 'Planned'. Each column contains 'Start' and 'End' date pickers with calendar icons.
- Comments:** A large text area for additional notes.
- Buttons:** 'OK', 'OK and Add Another', and 'Cancel' buttons at the bottom right.

3. In the **Type** field, select type of performance term.
4. In the **Duration** field, enter the duration for the duration type for which the terms will be valid.
5. In the **Duration Type** field, select the period of time that you have to comply to the terms of the deal.
6. In the **Deal Ref. Item** field, enter the deal reference item or search for and select the deal reference item.
7. In the **Recommended Start** and **End** date fields, enter the vendor's recommended start and end dates or click the calendar icon and select the dates.
8. In the **Planned Start** and **End** date fields, enter the date you intend to start and end complying or click the calendar icon and select the dates.
9. Then choose one of the following options.
 - Click **OK** to save the changes and return to Proof of Performance page.
 - Click **OK and Add Another** to add more terms.
 - Click **Cancel** to reject all entries and close the pop-up.

Edit Proof of Performance Terms Definition


To edit proof of performance terms definition:

1. Select the terms definition you want to edit.

2. From the Actions menu, click **Edit** or click the Edit icon . The Edit Terms pop-up appears.
3. Edit the enabled fields as necessary.
4. Click **OK** to save the changes.
5. Click **Cancel** to discard the changes and close the pop-up.

Delete Proof of Performance Terms Definition

To delete proof of performance terms definition:

1. Select the terms definition you want to delete.
2. From the Actions menu, click **Delete** or click the Delete icon . You are prompted to delete the proof of performance term.
3. Click **Yes** to confirm deletion.
4. Click **No** to retain the proof of performance term.

Manage Fulfillment

The fulfillment section is used to record or view proof of performance term fulfillment for a deal.

Add Proof of Performance Fulfillment

To add proof of performance fulfillment:

1. From the More Actions menu, click **Proof of Performance**, and then click **Deal Performance**.

The Proof of Performance page appears, which includes the Fulfillment section.

Note

Fulfillments are specific to terms. You can add fulfillment only after you have added terms definition.


2. From the Actions menu, click **Add** or click the Add icon . The Add Fulfillment pop-up appears.

Figure 4-37 Add Fulfillment Pop-up

Add Fulfillment

Promotion

Dates

Start End


Comments

OK OK and Add Another Cancel

3. In the **Promotion** field, enter, select or search for a promotion.
4. In the Dates area:
 - In the **Start Date** field, enter the start date of the promotion, or click the calendar icon and select a date.
 - In the **End Date** field, enter the end date of the promotion, or click the calendar icon and select a date.
5. In the **Comments** field, enter any additional comments as necessary.
6. Click OK to add fulfillment. You can add more fulfillment by clicking **OK and Add Another**.
7. Click **Cancel** to close the fulfillment pop-up.

Delete Proof of Performance Fulfillment

To delete proof of performance fulfillment:

1. Select the proof of performance you want to delete.
2. From the Actions menu, click **Delete** or click the Delete icon .
- You are prompted to delete the proof of performance fulfillment.
3. Click **Yes** to confirm deletion.
4. Click **Cancel** to retain the record.

Manage Referenced Promotions

The Referenced Promotions option opens the Deal Promotions. This page allows you to associate a deal with a promotion. Multiple promotions can be attached to a deal. The promotion is set up in the pricing system and can then be attached to the deal.

Add Promotions to a Deal

To add promotions to a deal:


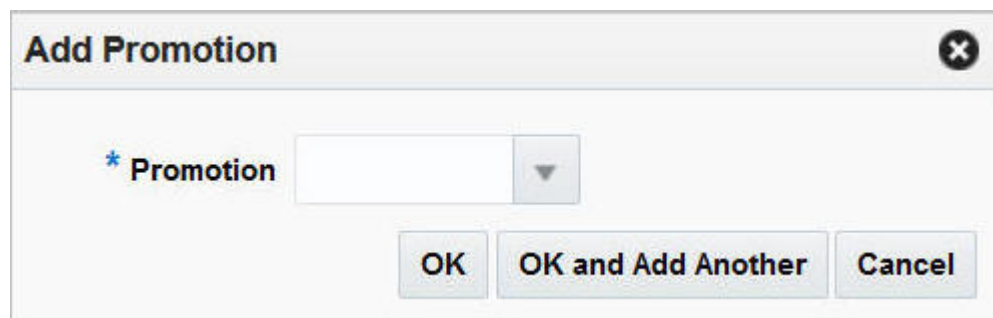
1. From the More Actions menu, click **Referenced Promotions**.
The Deal Promotions pop-up appears.
2. From the Actions menu, click **Add** or click the Add icon . The Add Promotions pop-up appears


Figure 4-38 Add Promotions Pop-up



3. In the **Promotion** field, enter, select or search for a promotion.
4. Click **OK** to save any changes.
5. You can add more promotions by clicking **OK** and **Add Another**.
6. Click **Cancel** to discard the changes and close the pop-up.
7. Click **Save** to save your changes or click **Save and Close** to save and close the pop-up.

Delete Deal Promotions

To delete deal promotions:

1. Select the deal promotions you want to delete.
2. From the Actions menu, click **Delete** or click the Delete icon .
You are prompted to delete the record.
3. Click **Yes** to confirm deletion.
4. Click **Cancel** to retain the record.

View Threshold Revisions

The threshold revisions pop-up is visible when revisions exist for a threshold.

To view the threshold revisions pop-up:

1. From the Tasks menu, select **Deals > Create Deal**. The Create Deal pop-up appears.
2. Enter the relevant data and click **OK** to save the changes. The Deal page appears.
3. In the Deal page, go to Thresholds section and then click **Revisions**. The Threshold Revisions pop-up appears.

Figure 4-39 Threshold Revisions Pop-up

Threshold Revisions

Currency USD

Actions View Detach Wrap

Revision No.	Lower Limit	Upper Limit	Value	Total / Unit	Target Level	Date	Action	Amendment Comments
1	90.0000	500.0000	5.0000	Unit	—	11/29/19	Update	
1	100.0000	500.0000	5.0000	Unit	—	11/29/19	Insert	
1	501.0000	1,500.0000	7.0000	Unit	—	11/29/19	Insert	
1	1,501.0000	2,500.0000	9.0000	Unit	—	11/29/19	Insert	

OK

View Deal Dates

Deal Dates is a view only pop-up to show the dates related to a deal.

View Deal Dates

To view deal dates:

- 1. From the More Actions menu, select **Deal Dates**. The Deal Dates pop-up appears.

Figure 4-40 Deal Dates Pop-up

Deal Dates

Created 2016-03-22 | rms_admin

Approved

Rejected

Closed

OK

- 2. Click **OK** to close the deal dates pop-up.

Create a Fixed Deal

The Fixed Deal page allows you to define the following deal specific information:

- Deal details
- Merchandise hierarchy against which deal can be claimed
- Location information at which deal can be claimed
- Promotion Details against which supplier has negotiated the deal

You can also define the terms and fulfillment that is negotiated with the vendor. This information can be entered through Proof of Performance page which is displayed by clicking **the Proof of Performance** button on the Fixed Deal page.


With fixed deals, your organization receives payments from vendors in return for mentioning their products in promotions or for displaying their products on prime shelf space. Fixed deal payments can be claimed from the vendor either periodically or all at once.

You can create fixed deals and set up a collection schedule, from which you can make claims against the vendor and receive payments.

Fixed deals are typically created in Active status; however, you can create a fixed deal in Inactive status. For deals with Inactive status claims are put on hold.

The Fixed Deal Report provides you with information about active claims. Claim information for inactive fixed deals is not included in the report.

Note

You can also create a fixed deal by clicking **Create** in the Actions menu, or by clicking the Create icon  on the Fixed Deal Search page.

The Fixed Deal page includes the following sections:

- [Fixed Deal Header](#)
 - Deal Collection
 - Invoice
- [Merchandise Hierarchy](#)

If the deal is associated to the merchandise hierarchy, then the Merchandise Hierarchy section appears.

- [Locations](#)

This section appears if you select **Merchandise** in the Deal header section.

- [Manage Referenced Promotions](#)
- [Fixed Deal Toolbar](#)

Figure 4-41 Fixed Deal Page

Fixed Deal x

Deal 650006Active

DescriptionFixed Deal

Org Unit

VendorSupplier245789755AUD Supplier

Merchandise

TypeLump Sum

Non Merch Code

Amount10,000AUD

Deal Collection

CollectMonthly

Collect Periods1

First Collect Datem/d/yyyy

Last Collect Date

Invoice

Processing Logic

Debit Note / Credit Note

Taxes

ActionsView+XPrintFilterDetach

Code	Basis	Rate	Amount
No data to display.			

Merchandise Hierarchy

ActionsView+XPrintFilterDetach

Department	Department Name	Class	Class Name	Subclass	Subclass Name
No data to display.					

Locations

ActionsView+XPrintFilterDetach

No data to display.					
---------------------	--	--	--	--	--

Deactivate

Proof of Performance

Save

Save and Close

Cancel

Create a Fixed Deal

To create a fixed deal:


1. From the Tasks menu, select **Deals > Manage Fixed Deal**. The Fixed Deal Search page appears.
2. From the Actions menu, select **Create** or click the Create icon . The Fixed Deal widow appears.

Figure 4-42 Fixed Deal Page

Fixed Deal x

Deal 650006Active

DescriptionFixed Deal

Org Unit

VendorSupplier245789755AUD Supplier

Merchandise

TypeLump Sum

Non Merch Code

Amount10,000AUD

Deal Collection

CollectMonthly

Collect Periods1

First Collect Datem/d/yyyy

Last Collect Date

Invoice

Processing Logic

Debit Note / Credit Note

Taxes

ActionsView+XPrintFilterDetach

Code	Basis	Rate	Amount
No data to display.			

Merchandise Hierarchy

ActionsView+XPrintFilterDetach

Department	Department Name	Class	Class Name	Subclass	Subclass Name
No data to display.					

Locations

ActionsView+XPrintFilterDetach

No data to display.					
---------------------	--	--	--	--	--

Deactivate

Proof of Performance

Save

Save and Close

Cancel

For more information on how to create a fixed deal, see the [Create a Fixed Deal](#) section.

Fixed Deal Header

The Fixed Deal Header includes the following fields.

Table 4-11 Fixed Deal Header - Fields and Description

Fields	Description
Title	The title displays Fixed Deal ID to the top left of the head container. The Deal Status is displayed to the top right of the head container. This field contains the deal number by default.
Description	Enter a description of the fixed deal.
Vendor	Select or search for the type of fixed deal vendor.
Type	Select the type of payment.
Amount	Enter the payment amount from the supplier.
Org Unit	Enter, select or search for an organizational ID.
Merchandise	If the deal is associated to the merchandise hierarchy, select the Merchandise check box. For more information on Merchandise Hierarchy, see Merchandise Hierarchy .
Non Merch Code	Enter, select or search for the non-merchandise code. The Non Merch field is required only if the Merchandise check box is not selected.
Deal Collection section:	
Collect	Select how often payment for the fixed deal is collected from the supplier. If you select Date in the Collect field, the number of collection period is always one.
First Collect Date	Enter the date, or click the calendar icon and select the date. The date of the collection of the first amount decided as part of the fixed deal.
Deal Collection section:	
Collect Periods	Enter the number of collection periods.
Last Collect Date	If you enter the date in the First Collect Date field, the Last Collect Date field is displayed by default. The number of times the collection date is to be repeated after the First Collect Date. On each collection date an invoice may be raised based on the invoicing options selected for the deal.
Invoice section:	
Processing Logic	Select how invoices are created for the fixed deal. The options of creating invoices are: Automatic, Manual, No Invoice Processing depending on the option selected.
Debit Note/Credit Note	Select whether you want to send a Debit or Credit Note request to the supplier.

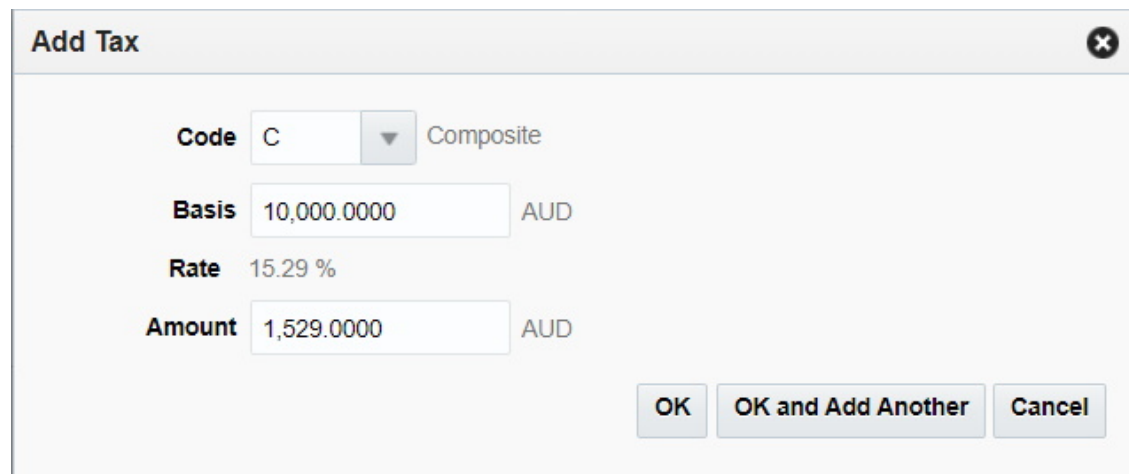
Taxes

Multiple tax codes can be supported per merchandise hierarchy or non-merchandise code in the Global Tax Solution (GTS) setup. The Taxes table allows you to manually add one or more taxes relevant to the fixed deal. The tax amount will get split between the set of hierarchies

added in the Merchandise Hierarchy table and then further divided into the locations added in the Locations table based on the user defined ratio.

The Add Tax pop-up allows you to add the taxes to the above table.

Figure 4-43 Add Tax



Add Tax

Code C Composite

Basis 10,000.0000 AUD

Rate 15.29 %

Amount 1,529.0000 AUD

OK OK and Add Another Cancel

Merchandise Hierarchy

The merchandise hierarchy allows you to create the relationships that are necessary in order to support the product management structure of a company. You can assign a buyer and merchandiser at the division, group, and department levels of the merchandise hierarchy. You can also link a lower level to the next higher level. For example, you can indicate which group a department belongs to or which division a group belongs to.

The location section appears if you select **Merchandise** in the Deal header section.

Add Merchandise Hierarchy

To add merchandise hierarchy:



1. In the Fixed Deal page, go to Merchandise Hierarchy section.
2. From the Actions menu, select **Add** or click the Add icon . The Add Merchandise Hierarchy pop-up appears.

Figure 4-44 Add Merchandise Hierarchy Pop-up

3. In the **Merchandise Level** field, click the merchandise level list and select the merchandise level that the deal applies to. This field is a required field.
4. In the **Department** field, select or search for the department.
5. In the **Class** field, select or search for a class.
6. In the **Subclass** field, select or search for a subclass.
7. Then choose one of the following options.
 - Click **OK** to save any changes and close the pop-up.
 - Click **OK and Add Another** to add additional merchandise hierarchies.
 - Click **Cancel** to discard the changes and close the pop-up.

Delete Merchandise Hierarchy

To delete merchandise hierarchy:

1. Select the merchandise hierarchy you want to delete.
2. From the Actions menu, select **Delete** or click the Delete icon . You are prompted to delete the record.
3. Click **Yes** to confirm deletion.
4. Click **Cancel** to retain the record.

Locations

The Locations section allows you to indicate at which locations the deal is effective.

Create Locations to a Fixed Deal

You can create locations when a fixed deal is created in the Fixed Deal page.

To create the locations to a fixed deal:

1. In the Fixed Deal page, go to Locations section.


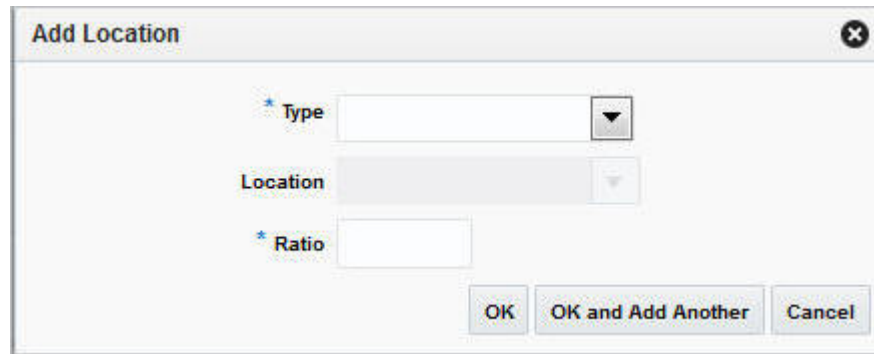
- From the Actions menu after entering the header details, click **Create** or click the Create icon . The Add Locations pop-up appears.

Figure 4-45 Add Locations Pop-up




The image shows a pop-up window titled "Add Location" with a close button (X) in the top right corner. Inside the window, there are three input fields: "Type" (a dropdown menu with a downward arrow), "Location" (a search field with a magnifying glass icon), and "Ratio" (a text input field). Each field is preceded by an asterisk (*). At the bottom right of the window, there are three buttons: "OK", "OK and Add Another", and "Cancel".

- In the **Type** field, select the location type you want to add to the fixed deal. This field is a required field.
- In the **Location** field, enter, select or search for the location. You can also search for a location through Basic or Advanced search.
- In the **Ratio** field, indicate what percentage of fixed deal the location contributes.
- Then choose one of the following options.
 - Click **OK** to add the location to the table and close the pop-up.
 - Click **OK and Add Another** to add additional locations.
 - Click **Cancel** to reject all entries and close the pop-up.

Delete Locations

To delete locations:

- Select the locations you want to delete.
- From the Actions menu, click **Delete** or click the Delete icon . You are prompted to delete the locations.
- Click **Yes** to confirm deletion.
- Click **Cancel** to retain the record.


Fixed Deal Toolbar

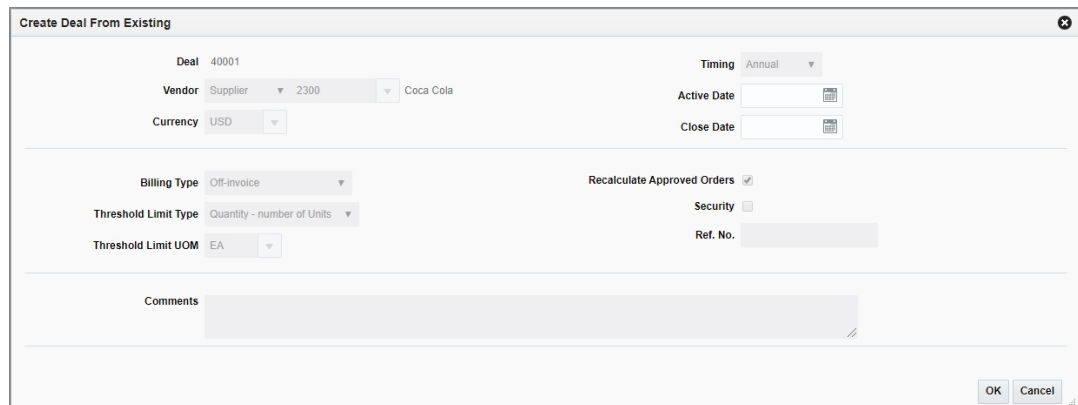
For information about the toolbar, see "[Screen Level Action - Icons and Buttons](#)" in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

Create from an Existing Deal

To create a deal from an existing deal, follow the steps below.

- From the Tasks menu, select **Deals > Manage Deal**. The Deal Search page appears.

2. From the Actions menu, select **Create from Existing** or click the Create from Existing icon . The Create from Existing pop-up appears.
1. **Figure 4-46 Create From Existing Pop-up**



2. Click **OK** to create a deal from an existing deal.
3. Click **Cancel** to return to Deal Search page.

Manage Fixed Deals

The Manage Fixed Deals option opens the Fixed Deal Search page. Managing a fixed deal involves performing one or more of the following tasks:

- Searching for a fixed deal
- Creating a fixed deal
- Editing a fixed deal
- Viewing a fixed deal

On clicking the Manage Fixed Deal link by selecting **Deals > Manage Fixed Deal**, the Fixed Deal Search page appears.

In the Fixed Deal Search page you can search, add, create, view, export to Excel, query by example, and detach deals. You can also create deals for items on a specific purchase order.

The Fixed Deal Search page includes the following sections:

- Search
For more information on the Fixed Deal Search page, see the [Search for a Fixed Deal](#) section.
- [Results](#)
- [Fixed Deal Search Toolbar](#)

Figure 4-47 Fixed Deal Search Page

Fixed Deal Search

Search

Match

All

Any

Deal

Description

Deal Type

Status

Partner

Supplier

First Collect Date

Last Collect Date

Advanced

Saved Search

Default

Search

Reset

Save As...

Results

Actions

View

Detach

Deal	Description	Deal Type	Status	Vendor Type	Vendor	Vendor Name	Amount	Currency
No data to display.								

Manage a Fixed Deal

To manage a fixed deal use the Actions menu, View menu and icons in the Merchandise Hierarchy section.

You can access the Terms Definition and Fulfillment sections by clicking the Proof of Performance button. For information on Terms Definition and Fulfillment of a fixed deal, see the [Manage Terms](#) and the [Manage Fulfillment](#) section.

Search for a Fixed Deal

To search for a fixed deal:

1. From the Tasks menu, select **Deals > Manage Fixed Deal**. The Fixed Deal Search page appears.
2. You can search a fixed deal by providing search criteria in the search section. The criteria can be provided either Basic or Advanced mode, depending on the requirement. Basic is the default mode when the search page is entered. Click **Advanced** to access the search panel in advanced mode. You can return to Basic mode by clicking **Basic**.

Search For a Fixed Deal Through the Basic Search Criteria

To search for a fixed deal through the basic search criteria:

1. Enter or select one or all of the following basic search criteria.

Table 4-12 Fixed Deal Search - Basic Search Criteria and Description

Search Field	Description
Match	You can match your search criteria by selecting All or Any radio button. <ul style="list-style-type: none"> • All - Only deals matching all entered search criteria are shown. • Any - Deals matching each entered search criteria are shown.
Deal	Enter the deal ID.
Description	Enter the description of the deal.
Deal Type	This is the reason for the payment and does not drive any functionality. However, it allows the quick grouping of fixed deals for custom reporting. The options are: Cancel Allowance, Allowance Non Performance, Display Allowance, Early Buy Allowance, New Discount, New Warehouse, Lump Sum, New Item Allowance, Slotting Allowance, New Distribution Allowance, Advertising Allowance, Other Allowance, Scan Based Allowance.
Status	Select the status of the deal. The options are: Active and Inactive.
Partner	Enter, select or search for the type of partner for which you are creating the fixed deal.
Supplier	Enter, select or search for the supplier ID for which you want to create a fixed deal.
First Collect Date	Enter the date, or click the Calendar icon and select the date.
Last Collect Date	Enter the date, or click the Calendar icon and select the date.

- Click on the Saved Search list to select one of the saved search criteria. Selecting a saved search populates the search section with the saved search criteria. If the run automatically function is enabled for the search, the search is executed immediately.

You can also personalize your saved searches by selecting **Personalize**. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see [Personalize Saved Search](#) in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

- Click **Search**. The fixed deals that match the search criteria are displayed in the Results section.
- Click **Reset** to clear the search section and results.
- Click **Save As...** to save the current search criteria. The Create Saved Search pop-up appears.

For more information about how to save your search criteria, see [Create Saved Search](#) in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

- Click **Done** to close the pop-up.

Search a Fixed Deal Through the Advanced Search Criteria

To search a fixed deal through the advanced search criteria:

- To search using advanced search criteria, enter or select one or all of the advanced search criteria.
- To narrow down the search, use the list next to the search fields. For example, determine if the entered value should equal or not equal the search result.

3. Click on the Saved Search list to select one of the saved search criteria. Selecting a saved search populates the search section with the saved search criteria. If the run automatically function is enabled for the search, the search is executed immediately.

You can also personalize your saved searches by selecting **Personalize**. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see [Personalize Saved Search](#) in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

4. Click **Search**. The fixed deals that match the search criteria are displayed in the Results section.
5. Click **Reset** to clear the search section and results.
6. Click **Save As...** to save the current search criteria. The Create Saved Search pop-up appears.

For more information about how to save your search criteria, see [Create Saved Search](#) in the *Oracle® Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

7. Click **Add Fields** to add more fields for the advanced search. To remove the field from the search, click the x right next to the field.
8. Click **Reorder** to change the order of the available search fields. The Reorder Search Fields pop-up appears.
 - Select the desired search field and use the up and down arrows to rearrange the order of the fields.
 - Click **OK** to confirm the new order of the fields and close the pop-up.
 - Click **Cancel** to reject any changes and close the pop-up.
9. Click **Done** to close the page.

Results

The Results section lists the retrieved fixed deals.

Fixed Deal Search Toolbar

For information about the toolbar, see "[Screen Level Action - Icons and Buttons](#)" in the *Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide*.

Edit a Fixed Deal

To edit a Fixed deal:


1. From the Tasks menu, select **Deals > Manage Fixed Deal**. The Fixed Deal Search page appears.
2. Select the deal you want to edit.
3. From the Actions menu, select **Edit** or click the Edit icon . The Fixed Deal page appears.

Figure 4-48 Fixed Deal Page in Edit Mode

Fixed Deal x

Deal 70003 Active

Description: DM_TEST_Partner_Merch Org Unit: [Dropdown]

Vendor: Distributor [1287987387] DM_Distributor Merchandise: [X]

Type: Lump Sum Non Merch Code: [Dropdown]

Amount: 20,000 USD

Deal Collection

Collect: Annually Collect Periods: 2

First Collect Date: 5/2/20 Last Collect Date: 5/2/21

Invoice

Processing Logic: Manual Debit Note / Credit Note: Credit Note [Dropdown]

Taxes

Code	Basis	Rate	Amount
Miscellaneous_1	20,000	1.5	0.3000
Standard	20,000	13.17	2.6340

Merchandise Hierarchy

Promotions

Promotion	Description
11	PR1

Deactivate Proof of Performance Save Save and Close Cancel

4. Make the necessary changes and click **Save** to save the changes.

View a Fixed Deal

To view a fixed deal:

1. From the Tasks menu, select **Deals > Manage Fixed Deal**. The Fixed Deal Search page appears.
2. Enter additional criteria as desired to make the search more restrictive.
3. Select the deal you want to view.
4. From the Actions menu, select **View** or click the View icon . The Fixed Deal page appears.

Figure 4-49 Fixed Deal Page in View Mode

Fixed Deal

Deal 65002Inactive

DescriptionDM_TEST_SUP_MERCH

VendorSupplier1218Dm_Supplier2

TypeNew Discount

Amount30.0000USD

Deal Collection

CollectDate

First Collect Date5/2/20

Invoice

Processing LogicAutomatic

Org Unit

Merchandise

Non Merch Code

Collect Periods1

Last Collect Date5/2/20

Debit Note / Credit NoteCredit Note

Taxes

ActionsView

CodeBasisRateAmount

Standard30.000013.173.9510

Merchandise Hierarchy

ActionsView

DepartmentDepartment Name

1208DM_GTS_DEPT

Locations

ActionsView

TypeLocationLocation NameRatio

Proof of Performance

Done

5. Click **Done** to close the page.

Activate/Deactivate a Fixed Deal

A fixed deal present in the system might need to be activated or deactivated at different points of time based on the specific requirements of the business. This activation/deactivation of the deal can be done using the process mentioned below.

Activate a Fixed Deal

Any fixed deal is created within the system is in Active state by default. However, if any active deal has been previously deactivated and is currently in the Inactive state, it can be activated using the Activate button in the Fixed Deal page. Clicking Activate will also change the label on the button to read Deactivate, to provide an option for future deactivation.

Deactivate a Fixed Deal

Any deal which is in Active status can be deactivated using the Deactivate button in the Fixed Deal page. This can be done while creating the deal or later via an Edit operation. Clicking the Deactivate button will also change the label on the button to read Activate, to provide an option for future activation.

Figure 4-50 Fixed Deal Page in Edit Mode

Fixed Deal

Deal 70003Active

DescriptionDM_TEST_Partner_Merch

Org Unit

VendorDistributor1267967967DM_Distributor

Merchandise

TypeLump Sum

Non Merch Code

Amount20.0000USD

Deal Collection

CollectAnnually

Collect Periods2

First Collect Date5/2/20

Last Collect Date5/2/21

Invoice

Processing LogicManual

Debit Note / Credit NoteCredit Note

Taxes

ActionsView+XDetach

Code	Basis	Rate	Amount
Miscellaneous_1	20.0000	1.5	0.3000
Standard	20.0000	13.17	2.6340

Merchandise Hierarchy

Promotions

ActionsView+XDetach

Promotion	Description
11	PR1

DeactivateProof of PerformanceSaveSave and CloseCancel

Delete a Fixed Deal

A fixed deal which is not required in the system can be deleted using the Delete icon present in the Create/Edit Fixed Deal UI, based on user privileges.

Figure 4-51 Fixed Deal Page in Edit Mode

Fixed Deal

Deal 70003Active

DescriptionDM_TEST_Partner_Merch

Org Unit

VendorDistributor1267967967DM_Distributor

Merchandise

TypeLump Sum

Non Merch Code

Amount20.0000USD

Deal Collection

CollectAnnually

Collect Periods2

First Collect Date5/2/20

Last Collect Date5/2/21

Invoice

Processing LogicManual

Debit Note / Credit NoteCredit Note

Taxes

ActionsView+XDetach

Code	Basis	Rate	Amount
Miscellaneous_1	20.0000	1.5	0.3000
Standard	20.0000	13.17	2.6340

Merchandise Hierarchy

Promotions

ActionsView+XDetach

Promotion	Description
11	PR1

DeactivateProof of PerformanceSaveSave and CloseCancel

Proof of Performance

Manage Terms

The Terms Definition section is used to define proof of performance terms for a given fixed deal. These terms are defined by the deal partner that offers the deal.

Add a Fixed Deal Terms Definition

To add fixed deal terms definition:

1. From the Tasks menu, select **Deals > Create Fixed Deal**. The Fixed Deal page appears.
2. Click **Proof of Performance**.

The Proof of Performance page appears which includes the Terms Definition and Fulfillment sections.


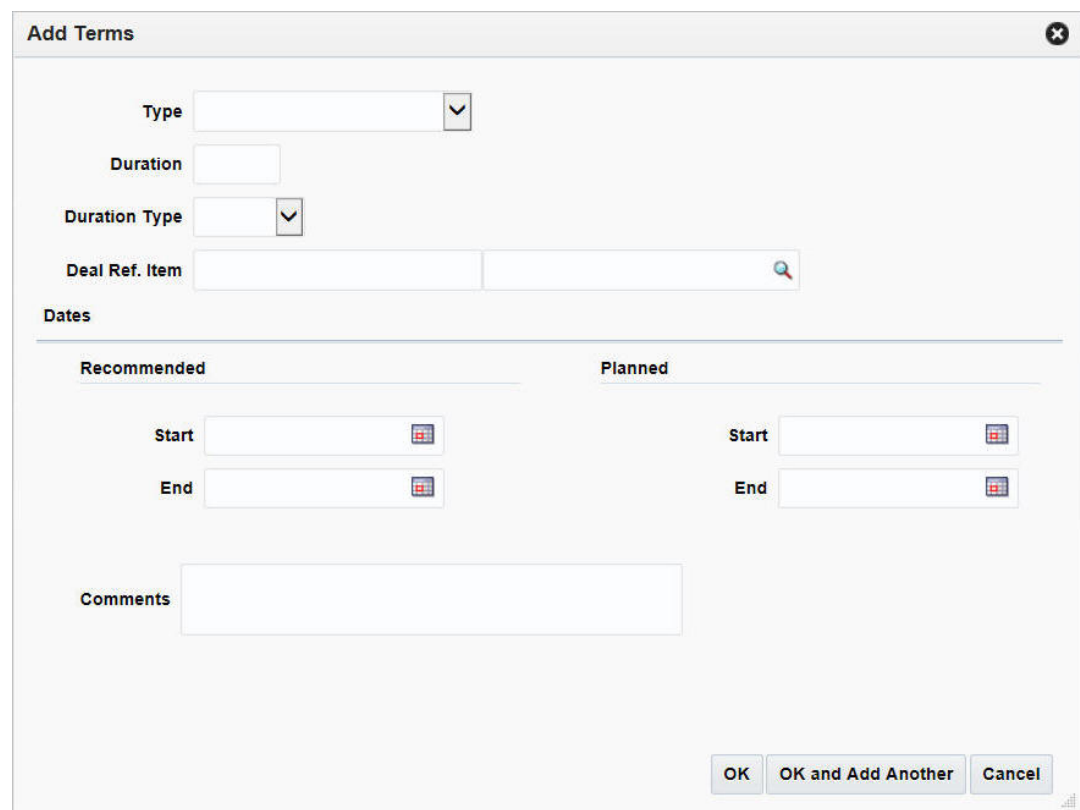
3. From the Actions menu, click **Add** or click the Add icon . The Add Terms pop-up appears.

Figure 4-52 Add Terms Pop-up



Add Terms

Type

Duration

Duration Type

Deal Ref. Item

Dates

Recommended	Planned
Start <input type="text" value=""/>	Start <input type="text" value=""/>
End <input type="text" value=""/>	End <input type="text" value=""/>

Comments


OK OK and Add Another Cancel

4. In the **Type** field, select what must be done to comply with the terms of the deal.
5. In the **Duration** field, enter the duration for which the terms will be valid.
6. In the **Duration Type** field, select the period of time that you have to comply to the terms of the deal.

7. In the **Deal Ref. Item** field, enter the deal reference item or search for and select the deal reference item.
8. In the **Recommended Start** and **End** date fields, enter the vendor's recommended start and end dates or click the calendar icon and select the dates.
9. In the **Planned Start** and **End** date fields, enter the date you intend to start and end complying or click the calendar icon and select the dates.
10. In the Comments field, add a comment if necessary.
11. Then choose one of the following options.
 - Click **OK** to the terms and close the pop-up.
 - Click **OK and Add Another** to add additional terms.
 - Click **Cancel** to reject all entries and close the pop-up.


Edit Fixed Deal Proof of Performance Terms Definition

To edit proof of performance terms definition:

1. Select the proof of terms definition you want to edit.
2. From the Actions menu, click **Edit** or click the Edit icon  .
The Edit Terms pop-up appears.
3. Edit the enabled fields as necessary.
4. Click **OK** to save the changes.

Delete a Fixed Deal Proof of Performance Terms Definition

To delete proof of performance terms definition:

1. Select the proof of performance you want to delete.
2. From the Actions menu, click **Delete** or click the Delete icon  .
You are prompted to delete the proof of performance term.
3. Click **Yes** to confirm deletion.
4. Click **Cancel** to retain the record.

Manage Fulfillment

The Fixed Deal Fulfillment section is used to record or view proof of performance term fulfillment for a fixed deal.

Recording the fulfillment of these terms is a manual process and no fulfillment is calculated from other merchandising transactions.

An example: A supplier may define a proof of performance stating: "In order to qualify for the deal, the retailer needs to promote the item by displaying it on an end cap for 28 days." You may want to enter the start and end dates of the display period and/or promotion as a proof of performance fulfillment requirement.

Add a Fixed Deal Proof of Performance Fulfillment

To add fixed deal proof of performance fulfillment:

1. From the Tasks menu, select **Deals > Create Fixed Deal**. The Fixed Deal page appears.
2. Click **Proof of Performance**.

The Proof of Performance page appears which includes the Terms Definition and Fulfillment sections.

3. **Note**

You can add fulfillment only if you add terms definition.


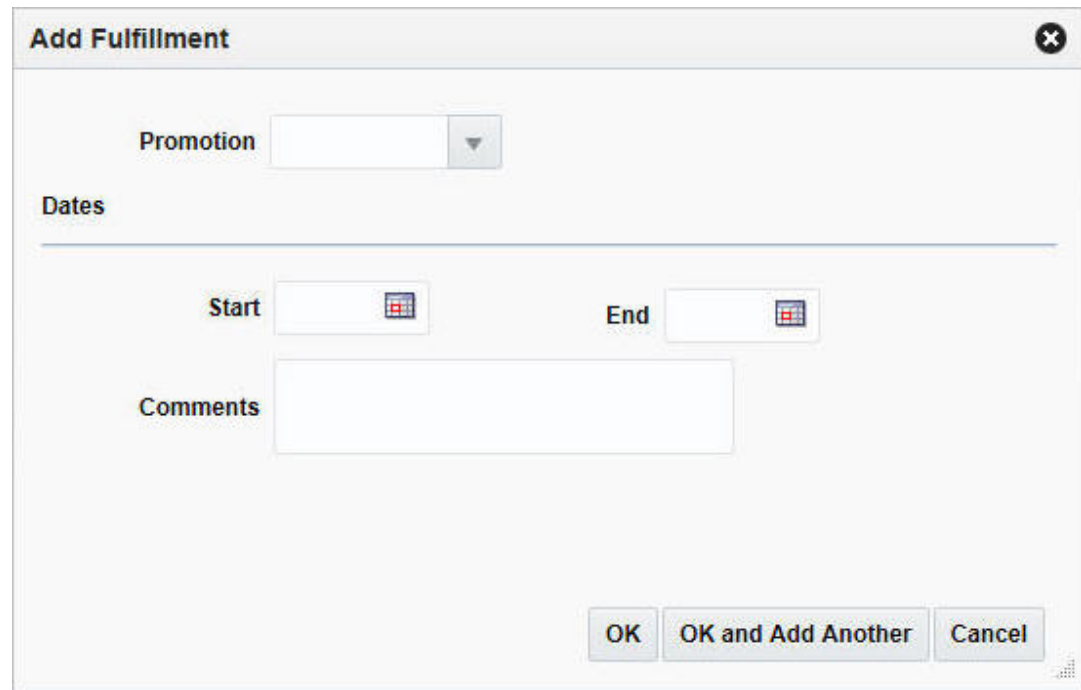
4. From the Actions menu, click **Add** or click the Add icon  .
The Add Fulfillment pop-up appears.


Figure 4-53 Add Fulfillment Pop-up



5. In the Promotion field, enter, select or search for a promotion.
6. In the Dates area:
 - In the **Start Date** field, enter the start date of the promotion, or click the calendar icon and select a date.
 - In the **End Date** field, enter the end date of the promotion, or click the calendar icon and select a date.
7. Then choose one of the following options.
 - Click **OK** to the fulfillment and close the pop-up.
 - Click **OK and Add Another** to add fulfillments.
 - Click **Cancel** to reject all entries and close the pop-up.
8. Click **Save** to save your changes or click **Save and Close** to save and close the pop-up.

Delete a Fixed Deal Proof of Performance Fulfillment

To delete fixed deal proof of performance fulfillment:

1. Select the proof of performance you want to delete.
2. From the Actions menu, click **Delete** or click the Delete icon .
You are prompted to delete the proof of performance fulfillment.
3. Click **Yes** to confirm deletion.
4. Click **Cancel** to retain the record.

Manage Referenced Promotions

The Promotions page allows you to associate a fixed deal with promotions. You can attach multiple promotions to a fixed deal. The promotion is set up in the pricing system and can then be attached to the fixed deal.

Add Promotions to a Fixed Deal

To add promotions to a fixed deal:


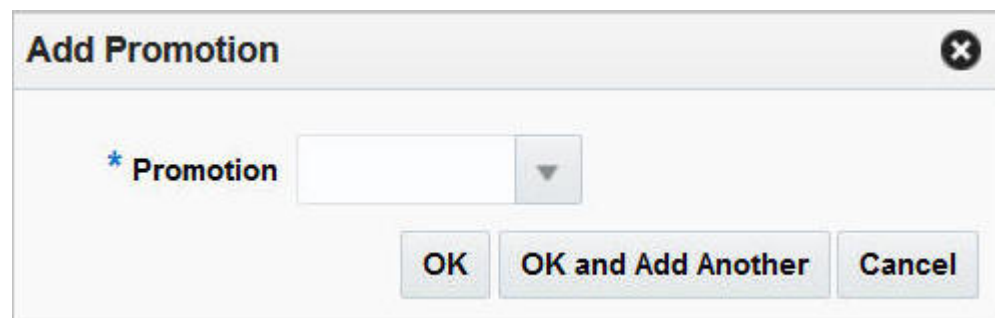
1. In the Fixed Deal page, go to Promotions section.
2. From the Actions menu, click **Add** or click the Add icon . The Add Promotions pop-up appears.


Figure 4-54 Add Promotions Pop-up



3. In the **Promotion** field, enter, select or search for a promotion. You can also search for promotions through Basic or Advanced search.
4. Then choose one of the following options.
 - Click **OK** to add the promotion to the table and close the pop-up.
 - Click **OK and Add Another** to add additional promotions.
 - Click **Cancel** to reject all entries and close the pop-up.

Delete Fixed Deal Promotions

To delete fixed deal promotions:

1. Select the fixed deal promotions you want to delete.
2. From the Actions menu, click **Delete** or click the Delete icon .
You are prompted to delete the record.
3. Click **Yes** to confirm deletion.
4. Click **Cancel** to retain the record.