

Oracle® Retail Merchandising Foundation Cloud Service Price Management User Guide



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Preface

This document describes the Oracle Retail Merchandising user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

Audience

This document is for users and administrators of Oracle Retail Merchandising. This includes merchandisers, buyers, business analysts, and administrative personnel.

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- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

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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.

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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

View Price Change History

In the Price Change History page you can view the transactions for an item, the locations, pricing, and margins.

In this page you can perform the following actions.

- Search for transactions for an item, locations, pricing, and margins by using various search criteria
- View the search results

You can access the Price Change History page from the Task menu, select **Price > Price Change History**. The Price Change History page appears.

Figure 1-1 Price Change History Page

The screenshot shows the 'Price Change History' page with the following elements:

- Price Lookup** section:
 - Transaction Date: [Calendar icon]
 - Transaction Type: Unit Retail Changed/Clearance
 - All Locations: [Dropdown menu]
 - Item: [Search input field]
 - Buttons: Lookup, Reset
- Results** section:
 - Actions: View, [Print icon], [Export icon], Detach
 - Table with columns: Transaction Date, Item, Location Type, Location, Transaction Type, Pricing Cost, Unit Retail, Currency, Margin %, UOM.
 - Table content:

Transaction Date	Item	Location Type	Location	Transaction Type	Pricing Cost	Unit Retail	Currency	Margin %	UOM
2/17/16	105000509	Store	1000	Unit Retail Changed/Clearance	40.0000	50.00	USD	12.00	EA
2/17/16	105000517	Store	1000	Unit Retail Changed/Clearance	40.0000	50.00	USD	12.00	EA
2/17/16	105000525	Store	1000	Unit Retail Changed/Clearance	40.0000	50.00	USD	12.00	EA
2/17/16	105000533	Store	1000	Unit Retail Changed/Clearance	40.0000	50.00	USD	12.00	EA
2/6/16	119750044	Store	1000	Unit Retail Changed/Clearance	100.0000	115.00	USD	13.04	EA
2/17/16	126200331	Store	1000	Unit Retail Changed/Clearance	40.0000	50.00	USD	12.00	EA
2/14/16	126251091	Store	1000	Unit Retail Changed/Clearance	100.0000	120.76	AUD	17.19	EA
2/15/16	126251091	Store	1112	Unit Retail Changed/Clearance	100.0000	100.00	AUD	0.00	EA
2/14/16	126251104	Store	1000	Unit Retail Changed/Clearance	100.0000	120.76	AUD	17.19	EA
 - Columns Hidden: 2
 - Total Records: 0
 - Buttons: [Help icon], Done

To look up price history:

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

Table 1-1 Price Change History Lookup - Search Criteria and Description

Fields	Description
Transaction Date	Enter a transaction date or use the Calendar icon to select a date.

Table 1-1 (Cont.) Price Change History Lookup - Search Criteria and Description

Fields	Description
Transaction Type	Select the transaction type from the list.
Location Type	Select a location type from the list. Then enter, select or search for the location ID.
Item/Item Parent	Select item or item parent from the list. Then enter, select or search for the item or item parent

2. Click **Lookup**. The transactions that match the search criteria are displayed in the Results section.
 - Click **Reset** to refresh the page. All entries are reset and not saved.
3. Click **Done** to close the page.

2

Manage Competitive Pricing

Competitive pricing is the process of reviewing prices offered by competitors in order to strategically set price points relative to competition. Competitive shop requests are created in the Competitor Shop Request page, and then once a shopper has performed a competitive shop, the competitive prices can be recorded. A history of the competitive prices is also retained which can be updated or deleted. This information is only available for reporting purposes in Merchandising.

Manage Competitors, Competitor Stores, and Shoppers

Competitors, competitor stores, competitor store associations with your stores, and competitive shoppers are maintained through the upload/download process. This functionality is accessed from the main Merchandising task list under Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data.

To add, update, or remove competitor information, select the template type of Price and Cost from the Download Data screen and then the template Competitors. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice.

Add a Competitor

To add a new competitor, start in the Competitor tab, and, in a blank line in the template, select the action type of Create. Next enter a unique competitor identifier (up to 10 digits) and the name for the competitor in the primary language (as defined in the Merchandising system options) of up to 120 characters. Optionally, you can also enter the address, phone, fax, website or jurisdiction of the competitor in the subsequent columns.

Next, the stores that belong in this competitor can be added. To do this, move to the Competitor Stores tab in the spreadsheet. Again, navigate to a blank row in the sheet and select an action type of Create. Enter the first store (up to 10 digits), along with your new competitor and the store's name and currency. The store name should be in the primary language (as defined in the Merchandising system options) and can be up to 150 characters. Optionally, you can also enter the store's address, phone, fax and additional store attributes. Continue this process until all the competitor stores for the competitor have been added. If you are adding a new competitor store to an existing competitor, this same process would apply, just using the existing competitor instead.

Next, you can associate your stores with competitor stores. To do this, move to the Store Associations tab in the spreadsheet. Again, navigate to a blank row in the sheet and select an action type of Create. Enter one of your stores you'd like to associate a competitor store. Next, enter the competitor store that you added in the Competitor Stores tab. The Target Competitor column, which determines which of the competitor stores is the target competitor for your store, must be set to Yes or No. Next enter the rank of the competitor store when compared to other competitor stores linked to your store. Lastly enter the distance between your store and the competitor's store along with the unit of measure in which the distance value was entered. Continue this process until all the competitor store associations have been made for your stores. If you are adding a new store association to an existing

competitor store, this same process would apply, just using the existing competitor store instead.

Lastly, you can add competitive shoppers. To do this, move to the Competitive Shoppers tab in the spreadsheet. Again, navigate to a blank row in the sheet and select an action type of Create. Enter the first shopper (up to 4 digits), along with a name. The shopper name should be in the primary language (as defined in the Merchandising system options) and can be up to 120 characters. Optionally, you can also enter the shopper's phone and fax. Continue this process until all competitive shoppers have been added.

Update a Competitor

If you would like to update any details for an existing competitor, a similar process will be followed as that described above for creating new competitors. 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:

- Competitor - Competitor Name, Address 1, Address 2, Address 3, City, State, Country, Postal Code, Phone, Fax, Website, Jurisdiction
- Competitor Stores - Store Name, Address 1, Address 2, Address 3, City, State, Country, Postal Code, Phone, Fax, Website, Store Format, Currency, Total Area, Selling Area, Store Open Date, Store Close Date, Estimated Yearly Volume, Jurisdiction
- Competitor Store Associations - Target Competitor, Rank, Distance, Unit of Measure
- Competitive Shoppers - Shopper Name, Shopper Phone, Shopper Fax

In the tab where you are going to make your updates, select the action type of Update, and then correct the value in the spreadsheet.

Deleting a Competitor

If you wish to delete a competitor, update the action column to select Delete in each of the tabs where it occurs. Competitor stores for the competitor can be deleted from an existing competitor in a similar manner. A Competitor or competitor stores cannot be deleted if they are associated with a competitive shop request. Competitor store associations and competitive shoppers can also be deleted in a similar manner.

Uploading Changes

For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and select Foundation Data > Upload Foundation Data from the main task list. In this screen, select the template type Price and Cost and the template Competitor. This will generate a process description automatically, but this can be updated if desired. Lastly, select the Browse button and navigate to the directory where you saved the updated spreadsheet.

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.

See also [Download/Upload Data from Spreadsheets](#) and [View Data Loading Status](#).

Manage Competitive Prices and History

Competitive prices and competitive price history are maintained through the download/upload process. This functionality is accessed from the main Merchandising task list under Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data.

To enter, update, or remove a competitive prices, select the template type of Price and Cost from the Download Data screen and then the template Competitive Prices. Optionally enter a specific competitor or department for which you wish to download competitive prices. Leaving these fields blank will download all competitive prices. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice.

Enter Competitive Prices

To enter the results of a competitive shop, first, download the spreadsheet, and then navigate to the Competitor Price Entry tab. Next, find the competitive shop details requested for the competitor, competitor store and item for which you wish to enter the competitor's price. Select the action type of Update and enter the date on which the competitor's price was recorded. Next, enter the competitive retail and price type, Regular, Clearance or Promotion. If applicable enter the competitor's multi unit retail and promotion offer dates and type in the subsequent columns. Continue this process until all competitive shop prices have been entered. After uploading all competitive shop prices can be reviewed, updated and deleted as Competitive Price History.

Update Competitive Price History

If you would like to update any details for historical competitor prices, a similar process will be followed as that described above for entering prices. First, download the spreadsheet, and then navigate to the Competitive Price History tab to make your updates.

The following columns can be updated:

- Competitor Retail, Price Type, Multi Units, Multi Unit Retail, Promotion Start Date, Promotion End Date, Offer Type

In the tab, select the action type of Update, and then correct the value in the spreadsheet.

Deleting Competitive Price History

If you wish to delete competitive price history, select the action type of Delete in each of the rows you wish to delete.

Uploading Changes

For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and select Foundation Data > Upload Foundation Data from the main task list. In this screen, select the template type Price and Cost and the template Competitive Prices. This will generate a process description automatically, but this can be updated if desired. Lastly, select the Browse button and navigate to the directory where you saved the updated spreadsheet.

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.

See also [Download/Upload Data from Spreadsheets](#) and [View Data Loading Status](#).

Manage Competitor Price History

The Competitor Price History page you can perform the following actions.

- Search for competitor prices by various search criteria
- View the search results
- View competitor price information
- Edit competitor price information

You can access Competitor Price History page from the Task menu, select **Price > Competitor Price History**. The Competitor Price History page appears.

Figure 2-1 Competitor Price History

The screenshot shows the 'Competitor Price History' page. At the top, there is a 'Search' section with a 'Match' dropdown set to 'All'. Below this are several search filters: 'Recorded Date' (calendar icon), 'Retail Type' (dropdown), 'Item' (text input with search icon), and 'Reference Item' (text input with search icon). On the right side, there are dropdowns for 'Store', 'Competitor', and 'Competitor Store'. At the bottom right of the search section are 'Search', 'Reset', and 'Save As...' buttons.

Below the search section is the 'Results' section. It features a toolbar with 'Actions', 'View', 'Format', 'Detach', and 'Wrap' options. The main part is a table with the following columns: 'Recorded Date', 'Item', 'Item Description', 'Competitor', 'Competitor Store', 'Competitor Retail', 'Currency Local', 'Retail Type', and 'Offer Type'. The table contains several rows of data, including items like 'Sample', 'Simple_Sellable_Pack', and 'Styles:BLUE'. At the bottom of the table, it shows 'Columns Hidden: 9' and 'Total Records: 16'. At the very bottom of the page are 'Save', 'Save and Close', and 'Cancel' buttons.

Recorded Date	Item	Item Description	Competitor	Competitor Store	Competitor Retail	Currency Local	Retail Type	Offer Type
12/8/15	0541	Sample	40002	35003	37.00	USD	Regular	BOGO - Buy One Get One
12/8/15	126600546	Simple_Sellable_Pack	40002	35003	133.97	USD	Regular	Bonus Card - End of Aisle
12/8/15	126600546	Simple_Sellable_Pack	45001	35004	33.97	AUD	Regular	Bonus Card - End of Aisle
12/8/15	127950285	Styles:BLUE	45001	35005	33.97	AUD	Regular	Bonus Card - End of Aisle
12/8/15	127950249	Styles:RED	45001	35004	33.97	AUD	Regular	Bonus Card - End of Aisle
12/8/15	127950249	Styles:RED	45001	35005	33.97	AUD	Regular	Bonus Card - End of Aisle

Searching for a Competitor Price

To search for a competitor price:

1. From the Task menu, select **Price > Competitor Price History**. The Competitor Price History page appears.
2. You can search for a competitor price 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.

Searching for a Competitor Price Through the Basic Search Criteria

To search for a competitor price using basic search criteria:

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

Table 2-1 Competitor Price History - Basic Search Criteria and Description

Fields	Description
Match option	Check radio button All or Any. All - only competitor price matching all entered search criteria are shown. Any - competitor prices matching any of the entered search criteria are shown.
Recorded Date	Enter a recorded date or use the Calendar icon to select a date.
Retail Type	Select a retail type from the list.
Item	Enter, select or search for an item.
Reference Item	Enter, select or search for the reference item.
Store	Enter, select or search for the store.
Competitor	Enter, select or search competitor.
Competitor Store	Enter, select or search for the competitor store.

2. Click **Search**. The competitor prices that match the search criteria are displayed in the Results section.
3. Click **Reset** to clear the search section and results.
For more information about searches, see [Search Screens](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.
4. Click **Save As...** to save the current search criteria. The Create Saved Search page appears.
5. Click **Done** to close the page.

Searching for a Competitor Price Through Advanced Search Criteria

To search for a competitor price using advanced search criteria:

1. To search using advanced search criteria, enter or select one or all of the advanced search criteria.
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 **Search**. The competitor prices that match the search criteria are displayed in the Results section.
4. Click **Reset** to clear the search section and results.
5. 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.
6. Click **Done** to close the page.

Editing a Competitor Price

To edit a competitor price, follow the steps below.

1. From the Tasks menu, select **Price > Competitor Price Change**. The Competitor Price History page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The competitor prices that match the search criteria are displayed in the Results section.
 - a. In the **Competitor Retail** column, enter the price for the item.
 - b. In the **Retail Type** column, select the retail type from the list.
 - c. In the **Offer Type** column, select the offer type from the list.
4. Then choose one of the following options.
 - Click **Save** to save your changes.
 - Click **Save and Close** to save your change and close the page.
 - Click **Cancel** to reject all entries and close the page.

Request a Competitive Shop

In the Competitor Shop Request page you can create a list of competitor's shops for an item list. You can then record the competitor's prices of these items.

Figure 2-2 Competitor Shop Request

The screenshot shows a web interface titled "Competitor Shop Request". At the top, there is a search bar for "Item List" with the value "6750048" and a dropdown menu showing "Shirts". Below this is a table with the following columns: Competitor, Competitor Name, Competitor Store, Competitor Store Name, Shopper, Shopper Name, and Shop Date. The table contains one row of data. At the bottom of the interface, there are buttons for "Save and Close", "Save and Create Another", and "Cancel".

Competitor	Competitor Name	Competitor Store	Competitor Store Name	Shopper	Shopper Name	Shop Date
40001	New competitor	601	601	41	Shopper 41	8/28/16

In the table you can maintain a list of competitor shops. The table displays the name, store, store name, shopper, shopper name and shop date.

Create a Competitive Shop List

You can create a competitive shop list in two different ways, either through the Price module or in the Foundation Data module.

To create a competitive shop list in the Foundation Data module, follow the steps below.

1. From the Tasks menu, select **Foundation Data > Items > Manage Item Lists**. The Item List page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The item lists that match the search criteria are displayed in the Results section.


4. Select a record in the Results table.
5. Then select **Actions > Create > Competitive Shop List**. The Competitor Shop Request page appears.

To create a competitive shop list in the Price module, follow the steps below.

1. From the Tasks menu, select **Price > Competitor Shop Request**. The Competitor Shop Request page appears.
2. In the **Item List** field, enter, select or search for the item list.

 **Note:**

If you have opened the Competitor Shop Request page through the Item List Search, the item list ID and description of the selected item list is displayed.

3. Select **Actions > Add**, or use the Add icon . The Add Competitor Shop Request page appears.
 - a. In the **Competitor** field, enter, select or search for the competitor.
 - b. In the **Competitor Store** field, enter, select or search for the store.
 - c. In the **Shopper** field, enter, select or search for the shopper.
 - d. In the **Shop Date** field, enter a shop date or use the Calendar icon to select a date.
 - e. Then choose one of the following options.
 - Click **OK** to add the competitor and close the page.
 - Click **OK and Add Another** to add additional competitors.
 - Click **Cancel** to reject all entries and close the page.