

Oracle® Retail Trade Management Foundation Data User Guide



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- Do you need different information or graphics? If so, where, and in what format?
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Preface

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

Documentation Accessibility

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<https://support.oracle.com>

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

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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.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Manage Import Foundation Data

Foundation data for Trade Management is managed through other software solutions. For more information:

- [“Outside Locations”](#) in the *Oracle Retail Merchandising Data User Guide*.
- [“Partner”](#) in the *Oracle Retail Merchandising Data User Guide*.
- [“Documents”](#) in the *Oracle Retail Merchandising Data User Guide*.
- [“Timelines”](#) in the *Oracle Retail Merchandising Data User Guide*.

Cost Zones

For information about cost zones, see [“Manage Cost Zones”](#) in the *Oracle Retail Merchandising Data User Guide*.

Outside Locations

For more information about outside locations, see [“Outside Locations”](#) in the *Oracle Retail Merchandising Data User Guide*.

Manage Entry Status and Types

Within the customs entry module, the Entry Status is used to capture the detailed steps of the entry through the customs clearance process, such as, Accepted/Not Liquidated, Liquidated, Rejected, or Cancelled. Entry Types indicate the purpose or classification of the entry, such as, Immediate Exportation, Informal – Free and Dutiable, Rejected Merchandise Drawback, or Trade Fair.

Entry statuses and types are maintained for each country of import 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 entry statuses and types, select the template type of **Import** from the Download Data screen and then the **Entry Status and Types** template. 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 an Entry Status or Type

To add a new entry status and type, start in the Entry Status tab, and, in a blank line in the template, select the action type of Create. Next enter a unique entry status identifier (up to 6 characters) and the country of import for which the status is being created. Next, enter the description for the entry status in the primary language (as defined in the Merchandising system options) of up to 250 characters.

Next, if you wish to add translations for the entry status in languages other than the primary language, this can be done in the Entry Status TL tab. Navigate to a blank row and select the

action type of Create and enter the entry status and import country for which the translation applies. Next, select the language in which the translated description will be entered. Finally, enter the translated description. The translated description can also be up to 250 characters long. This is an optional step.

Next, entry types can be added. To do this, move to the Entry Type tab in the spreadsheet. Again, navigate to a blank row in the sheet and select an action type of Create. Next enter a unique entry type identifier (up to 6 characters) and the country of import for which the type is being created. Next, enter the description for the entry type in the primary language (as defined in the Merchandising system options) of up to 250 characters.

Lastly, if you wish to add translations for the entry type in languages other than the primary language, this can be done in the Entry Type TL tab. Navigate to a blank row and select the action type of Create and enter the entry type and import country for which the translation applies. Next, select the language in which the translated description will be entered. Finally, enter the translated description. The translated description can also be up to 250 characters long. This is an optional step.

Update an Entry Status or Type

If you would like to update any entry status or entry type descriptions or translations, a similar process will be followed as that described above for creating new entry statuses and 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:

- Entry Status – Entry Status Description
- Entry Status TL – Entry Status Description
- Entry Type – Entry Type Description
- Entry Type TL – Entry Type Description

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 an Entry Status or Type

If you wish to delete an entry status or type, update the action column to select Delete in each of the tabs where it occurs. Entry status or type translations can be deleted in the same 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 **Import** and the template **Entry Status and Types**. 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.

For more information, see [“Download/Upload Data from Spreadsheets”](#) in the *Oracle Retail Trade Management Do the Basics User Guide*.

Freight Sizes and Types

Within the transportation module, the Freight Size is used to capture the size of vessel or container being used to transport the merchandise, such as 20 Foot Container or 40 Foot Container. Freight Types related to a bill of lading can be noted on a transportation record, such as, Container Freight Station to Container Freight Station, Container Yard to Container Yard, Less than Container Load, or Less than Truckload.

Freight sizes and types 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 freight sizes and types, select the template type of **Import** from the Download Data screen and then the **Freight Sizes and Types** template. 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 Freight Size or Type

To add a new freight size or type, start in the Freight Sizes tab, and, in a blank line in the template, select the action type of Create. Next enter a unique freight size identifier (up to 6 characters) and the description for the freight size in the primary language (as defined in the Merchandising system options) of up to 250 characters.

Next, if you wish to add translations for the freight size in languages other than the primary language, this can be done in the Freight Size Translations tab. Navigate to a blank row and select the action type of Create and enter the freight size for which the translation applies. Next, select the language in which the translated description will be entered. Finally, enter the translated description. The translated description can also be up to 250 characters long. This is an optional step.

Next, freight types can be added. To do this, move to the Freight Types tab in the spreadsheet. Again, navigate to a blank row in the sheet and select an action type of Create. Next enter a unique freight type identifier (up to 6 characters) and the description for the freight type in the primary language (as defined in the Merchandising system options) of up to 250 characters.

Lastly, if you wish to add translations for the freight type in languages other than the primary language, this can be done in the Freight Type Translations tab. Navigate to a blank row and select the action type of Create and enter the freight type for which the translation applies. Next, select the language in which the translated description will be entered. Finally, enter the translated description. The translated description can also be up to 250 characters long. This is an optional step.

Update a Freight Size or Type

If you would like to update any freight size or freight type descriptions or translations, a similar process will be followed as that described above for creating new freight sizes and 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:

- Freight Sizes – Freight Size Description
- Freight Size Translations – Freight Size Description
- Freight Types – Freight Type Description

- Freight Type Translations – Freight Type Description

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 Freight Size or Type

If you wish to delete a freight size or type, update the action column to select Delete in each of the tabs where it occurs. Freight size or type translations can be deleted in the same 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 **Import** and the template **Freight Sizes and Types**. 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.

For more information, see [“Download/Upload Data from Spreadsheets”](#) in the *Oracle Retail Trade Management Do the Basics User Guide*.

Standard Carrier Alpha Codes

Oracle Retail Trade Management supports the capturing of standard carrier alpha codes, also referred to as SCAC codes. A SCAC code is a unique code used to identify transportation companies. A SCAC code is typically two to four alphabetic letters long and was developed by the National Motor Freight Traffic Association in the 1960s to help the transportation industry computerize data and records. A container can have a different SCAC code than the vessel. The container SCAC code can be entered on transportation records. The vessel SCAC code can be captured on transportation and customs entry shipment records.

SCACs 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 SCAC information, select the template type of **Import** from the Download Data screen and then the **SCACs** template. 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 Standard Carrier Alpha Code

To add a new SCAC, start in the SCACs tab, and, in a blank line in the template, select the action type of Create. Next enter a unique standard carrier alpha code (up to 6 characters) and the description for the SCAC in the primary language (as defined in the Merchandising system options) of up to 120 characters.

Next, if you wish to add translations for the SCAC in languages other than the primary language, this can be done in the SCAC Translations tab. Navigate to a blank row and select the action type of Create and the language in which the translated description will be entered. Then, enter the SCAC for which the translation applies. Finally, enter the translated description. The translated description can also be up to 120 characters long. This is an optional step.

Update a Standard Carrier Alpha Code

If you would like to update any SCAC descriptions or translations, a similar process will be followed as that described above for creating new SCACs. 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:

- SCACs – SCAC Code Description
- SCAC Translations – SCAC Code Description

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 Standard Carrier Alpha Code

If you wish to delete a SCAC, update the action column to select Delete in each of the tabs where it occurs. SCAC translations can 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 **Import** and the template **SCACs**. 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.

For more information, see [“Download/Upload Data from Spreadsheets”](#) in the *Oracle Retail Trade Management Do the Basics User Guide*.

Harmonized Tariff Schedule Setup

Harmonized Tariff Schedules (HTS) are set up through the spreadsheet upload/download process. For a description of this process, see [“Download/Upload Data from Spreadsheets”](#) in the *Oracle Retail Trade Management Do the Basics User Guide*.

Harmonized Tariff Schedule Definition

Harmonized Tariff Schedules (HTS) are defined through the spreadsheet upload/download process. For a description of this process, see [“Download/Upload Data from Spreadsheets”](#) in the *Oracle Retail Trade Management Do the Basics User Guide*.