

# Oracle® Retail Pricing Cloud Service/ Pricing Foundation Data User Guide



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Oracle Retail Pricing Cloud Service/Pricing Foundation Data User Guide, Release 23.1.401.0

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- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

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# Preface

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

## Documentation Accessibility

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

## Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 13.1) or a later patch release (for example, 13.1.2). If you are installing the base release and additional patch releases, read the documentation for all releases

that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

## Improved Process for Oracle Retail Documentation Corrections

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.

This process will prevent delays in making critical corrections available to customers. For the customer, it means that before you begin installation, you must verify that you have the most recent version of the Oracle Retail documentation set. Oracle Retail documentation is available on the Oracle Technology Network at the following URL:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.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 Retail Documentation on the Oracle Help Center

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

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

(Data Model documents are not available through Oracle Help Center. You can obtain these documents through My Oracle Support.)

## Conventions

The following text conventions are used in this document:

| Convention             | Meaning                                                                                                                                |
|------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| <b>boldface</b>        | 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

## Configure Zones

The zone structure in Pricing Cloud Service allows you to define groupings of locations for pricing purposes and eliminates the need to manage pricing at the, more granular, location level. At the highest level, these groupings are divided into categories called zone groups. Zone groups are used in regular, clearance and promotional pricing. You can determine how zone groups are created for your business based on a number of different factors, the type of pricing event, regular and/or clearance, or the items being priced, such as by department or division.

Within zone groups are groupings of locations (stores or warehouses) called zones. The function of these zones is to group locations together in a manner that best facilitates company pricing strategies. For example, you might choose to create a zone group based on geographic region such as the North America. Then, within the North America Zone Group, you could have regional zones, such as:

- US East region
- US West region
- Mexico stores

Similarly, you can create a zone group based on customer characteristics. Then, within the zone group create zones with similar geographical or customer characteristics, such as

- US urban stores
- US rural stores

There are no restrictions on the number of locations a zone can contain and a location can (and likely will) exist in multiple zone groups. For example, a New York City store might exist in the US urban stores zone as well as the US East region zone, which is part of the North American Zone Group. However, two rules apply to the relationship between locations and zones:

- A location cannot exist in more than one zone within a zone group.
- All locations within the same zone must use the same currency.

## Add New Stores or Warehouses

When new stores or warehouses are added in Merchandising, a pricing location is designated for the new store or virtual warehouse. Pricing Cloud Service will take this information for the new location and attempt to add the new location to every zone group/zone in which the pricing location exists across all zone groups. If the pricing location and the new location are not of the same currency, then the new location will be added to every zone group where the pricing location exists, and the system will create a new zone for the location with the currency of the new location. This process applies for all store types, including company and customer (franchise, or wholesale) stores and stockholding or non-stockholding locations.

**Note:**

Pricing of warehouses is determined by a system option in Pricing Cloud Service.

## Empty Zones

You can create an empty zone and add locations to the zone at a later date. Price events can also be created against a zone with no locations, based on a system option setting; however, conflict checking will not run and future price detail is not created for these zones. Once locations have been added to those zones, any new item/location relationships created will be added to price events created for those zones.

## Zone Maintenance

When a location is added to an existing zone, the location will participate in any price events which are approved in the future, but it will not inherit any existing approved events. When a location is removed from a zone, it will stay on any existing approved events, but will not be included in any new events created for that zone. If a location needs to be added to or removed from an existing event, setting the event back to worksheet and then re-approving will add that location.

## Initial Price Zone Definition

Once zone groups are created in Pricing Cloud Service, you are able to assign them to Initial Price Zone Definitions. This allows you to specify the zone structure that is used when pricing new items added in a particular department, class, or subclass, including markup percentage, and markup type (cost or retail), and rounding rules.

**Note:**

Markup is also defined as part of the department creation process, but Pricing Cloud Service uses the Initial Zone Definition to determine initial price markup.

## Create Price Zone Groups

A Zone Group identifies a particular way of grouping locations for pricing purposes.

Perform the following procedure to create a price zone group:

1. From the Tasks menu, select Price Zones under Foundation Data. The Price Zone Groups tab appears.

**Figure 1-1 Price Zone Groups Tab**

| Zone Group | Zone Group Name              | Location Count |
|------------|------------------------------|----------------|
| 1          | All Locations                | 145            |
| 2          | Promo-All Stores             | 91             |
| 3          | North America Regional Group | 0              |

2. Select **Add Zone Group** from the Action menu. The Add Zone Group dialog appears.

**Figure 1-2 Add Zone Group Dialog**

3. Enter the zone group details for the following fields:
  - Zone Group – This field is a unique price zone group identifier.
  - Description – The description of the zone group.
4. Click **OK** to add the new price zone group. You are returned to the Price Zone Groups tab.

Click **OK and Add Another** to add the current price zone group to the table and add another without leaving the Add Zone Group dialog.

## Manage Zone Groups

Perform the following procedure to edit a price zone group:

1. From the Tasks menu, select Price Zones under Foundation Data. The Price Zone Groups tab appears.
2. From the Zone Group table, highlight the zone group you want to edit and select Price Zones from the Actions menu. Alternatively, highlight the zone group and click the Price Zones button. The Price Zones tab appears.

Figure 1-3 Price Zones Tab

Oracle Pricing

Price Zone Groups | Price Zones

Zone Group 2 - Promo-All Stores

**Zones**

| Zone | Description | Locations | Currency | Base Zone                           |
|------|-------------|-----------|----------|-------------------------------------|
| 7001 | Colombia    | 6         | COP      | <input type="checkbox"/>            |
| 8001 | Europe      | 17        | EUR      | <input type="checkbox"/>            |
| 9001 | US-Western  | 4         | USD      | <input type="checkbox"/>            |
| 9101 | US-Central  | 4         | USD      | <input type="checkbox"/>            |
| 9201 | US-Eastern  | 16        | USD      | <input checked="" type="checkbox"/> |
| 9301 | Outlet      | 0         | USD      | <input type="checkbox"/>            |

**Locations**

| Type  | Location | Name          |
|-------|----------|---------------|
| Store | 1331     | Atlanta       |
| Store | 1621     | Baltimore     |
| Store | 1122     | Boston        |
| Store | 1761     | Catalog Store |
| Store | 1833     | Des Moines    |
| Store | 1111     | Manhattan     |

**Unassigned Locations**

| Type  | Location | Name                                 | Currency |
|-------|----------|--------------------------------------|----------|
| Store | 1171     | .COM store                           | USD      |
| Store | 55911    | Australia .COM Store                 | AUD      |
| Store | 55913    | Australia Franchise Non Stock Hol... | AUD      |

Save Save and Close Cancel

3. From the Zones tab, you can perform the following actions:

- [Add Zones](#)
- [Delete Zones](#)
- [Add Locations](#)
- [Delete Locations](#)

## Add Zones

1. From the Zones table, select **Add Zone** from the Actions menu. The Add Zones dialog appears.

Figure 1-4 Add Zones Dialog

**Add Zones**

\* Zone

\* Description

\* Currency

OK OK and Add Another Cancel

2. In the Zones field, enter a unique price zone identifier.
3. In the Description field, enter a description for the zone.

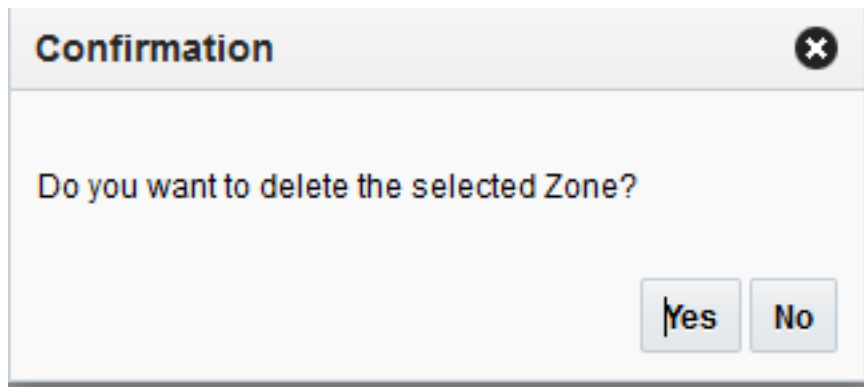
4. In the Currency field, select the currency for the price zone from the drop-down list.
5. Click **OK** to add the new zone. You are returned to the Zones tab.

Click **OK and Add Another** to add the current zone to the table and add another without leaving the Add Zones dialog.

## Delete Zones

1. From the Zones table, highlight the zone you want to delete and select **Delete** from the Action menu. The delete zone confirmation dialog appears.

**Figure 1-5 Delete Zone Confirmation Dialog**



2. Click **Yes** to confirm the deletion. You are returned to the Zones tab.

## Add Locations

The Add Locations dialog allows users to assign locations to an existing zone.



### Note:

If a location is already in the Locations table, it will not be added a second time.

1. From the Locations table, select **Add Locations** from the Actions menu. The Add Locations dialog appears.

**Figure 1-6 Add Locations Dialog**

| Location Type | Location | Name    | Group Name    |
|---------------|----------|---------|---------------|
| S             | 1511     | Seattle | USA Northwest |

2. From the Group field, select the group type for the location. Options are:

- Location List
- Chain
- Area
- Region
- District
- Store
- Warehouse

 **Note:**

Warehouse is only shown as an option for group type if the Recognize Warehouses as Locations system option is enabled.

- Unassigned Locations
3. Once a Group is selected, select or enter a Group Value.
  4. Click **Apply** to add the new location to the Location table.
  5. When all locations are added, click **OK** to add the new locations. You are returned to the Zones tab.

Click **OK and Add Another** to add the current location to the table and add another without leaving the Add Locations dialog.

## Delete Locations

The Delete function allows a location to be removed from a zone.

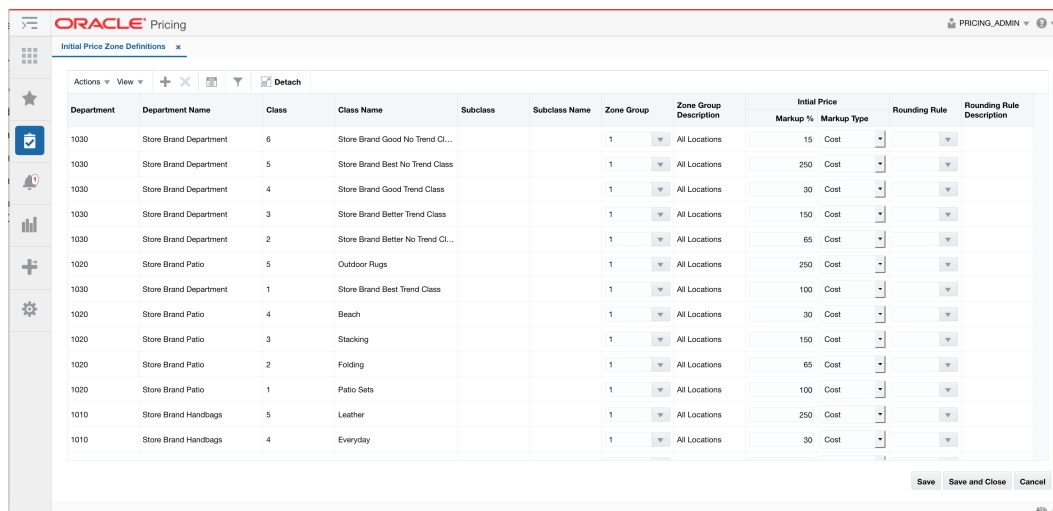
1. From the Zones table, highlight the zone you want to delete and select **Delete** from the Action menu. The delete location confirmation dialog appears.
2. Click **Yes** to confirm the deletion. You are returned to the Zones tab.

## Assign to Hierarchies

Perform the following procedure to set up initial price zone definitions:

1. From the Tasks menu, select Initial Price Zone Definitions under Foundation Data. The Initial Price Zone Definitions tab appears.

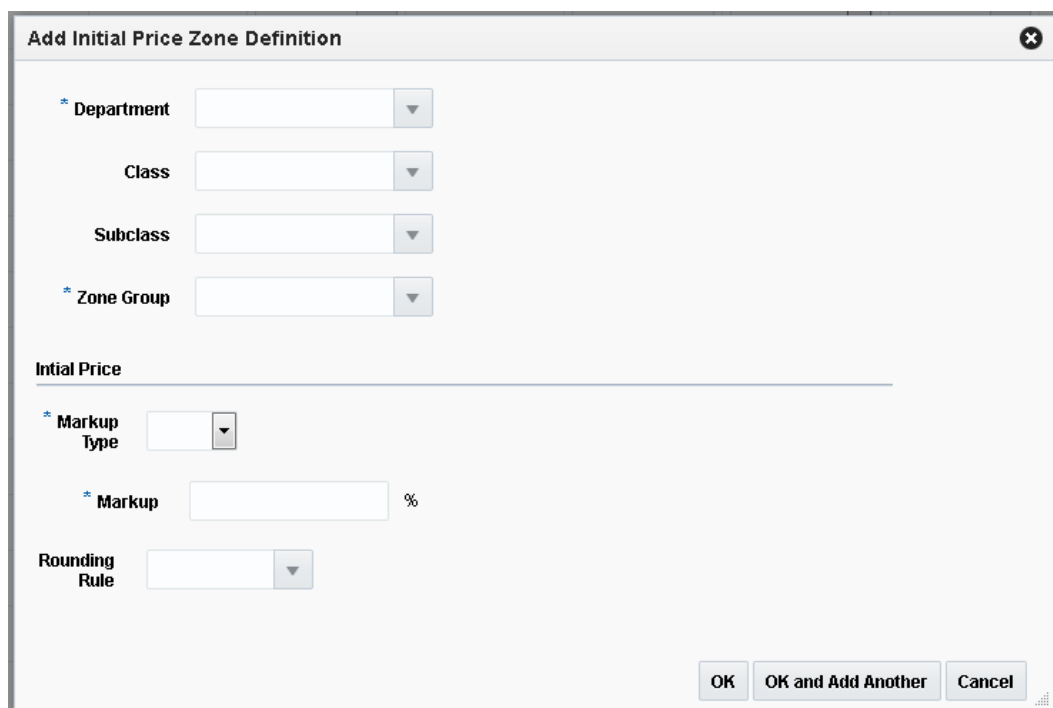
**Figure 1-7 Initial Price Zone Definitions Tab**



| Department | Department Name        | Class | Class Name                        | Subclass | Subclass Name | Zone Group | Zone Group Description | Initial Price Markup % | Markup Type | Rounding Rule | Rounding Rule Description |
|------------|------------------------|-------|-----------------------------------|----------|---------------|------------|------------------------|------------------------|-------------|---------------|---------------------------|
| 1030       | Store Brand Department | 6     | Store Brand Good No Trend Cl...   |          |               | 1          | All Locations          | 15                     | Cost        |               |                           |
| 1030       | Store Brand Department | 5     | Store Brand Best No Trend Class   |          |               | 1          | All Locations          | 250                    | Cost        |               |                           |
| 1030       | Store Brand Department | 4     | Store Brand Good Trend Class      |          |               | 1          | All Locations          | 30                     | Cost        |               |                           |
| 1030       | Store Brand Department | 3     | Store Brand Better Trend Class    |          |               | 1          | All Locations          | 150                    | Cost        |               |                           |
| 1030       | Store Brand Department | 2     | Store Brand Better No Trend Cl... |          |               | 1          | All Locations          | 65                     | Cost        |               |                           |
| 1020       | Store Brand Patio      | 5     | Outdoor Rugs                      |          |               | 1          | All Locations          | 250                    | Cost        |               |                           |
| 1030       | Store Brand Department | 1     | Store Brand Best Trend Class      |          |               | 1          | All Locations          | 100                    | Cost        |               |                           |
| 1020       | Store Brand Patio      | 4     | Beach                             |          |               | 1          | All Locations          | 30                     | Cost        |               |                           |
| 1020       | Store Brand Patio      | 3     | Stacking                          |          |               | 1          | All Locations          | 150                    | Cost        |               |                           |
| 1020       | Store Brand Patio      | 2     | Folding                           |          |               | 1          | All Locations          | 65                     | Cost        |               |                           |
| 1020       | Store Brand Patio      | 1     | Patio Sets                        |          |               | 1          | All Locations          | 100                    | Cost        |               |                           |
| 1010       | Store Brand Handbags   | 5     | Leather                           |          |               | 1          | All Locations          | 250                    | Cost        |               |                           |
| 1010       | Store Brand Handbags   | 4     | Everyday                          |          |               | 1          | All Locations          | 30                     | Cost        |               |                           |

2. Select **Add** from the Action menu. The Add Initial Price Zone Definition dialog appears.

**Figure 1-8 Add Initial Price Zone Definition Dialog**



**Add Initial Price Zone Definition**

\* Department

Class

Subclass

\* Zone Group

**Initial Price**

\* Markup Type

\* Markup  %

Rounding Rule

3. Enter the initial price zone definition details for the following fields:

- Department – Enter or select a single department.

 **Note:**

The Department, Class, and Subclass fields have a cascading relationship. You can enter or select values for the three fields in any order but the values will vary depending on selections.

- Class – Enter or select a single class.
- Subclass – Enter or select a single subclass.
- Zone Group – The Zone Group specified here is used as the structure for the initial price setting for new items added to the defined level of the Merchandise Hierarchy.
- Markup Type – The value entered in this field determines how markup is calculated for items existing in the defined hierarchy.
- Markup – This percentage field is used to calculate the initial retail based on the item's cost.
- Rounding Rule – This field allows you to assign a rounding rule to the initial price zone definition. The rounding rule is used to adjust final price used for the initial price of new items to meet the retailer pricing strategy.

## 2

# Use Rounding Rules

Rounding rules help you create a uniform pricing strategy. They are used to smooth proposed retails in order to maintain a consistent set of price points by applying "ends in" logic to retail values. Rounding Rules are defined globally, but can also include exceptions or exclusions based on merchandise hierarchy and/or currency. This provides a simple but flexible configuration to handle a wide variety of scenarios.



### Note:

Editing rounding rules details will only affect retails derived by the rounding rules from that point on. It will not affect/overwrite any retails that have already been derived based on the old rounding rules.

Rounding rules are optional. If you do not use rounding rules, the following rules are enforced for "percent off" price events, based on the number of decimal places defined as part of the currency set up in Merchandising:

- Regular Price Changes: if the extra digit (beyond the number of digits for the currency) is between 0 and 4, round down; if it is between 5 and 9, round up.
- Clearance Events: retail will always round down

## Manage Rounding Rules

Perform the following procedure to create rounding rules:

1. From the Tasks menu, select Rounding Rules under Foundation Data. The Rounding Rules tab appears.

**Figure 2-1 Rounding Rules Tab**

| ORACLE Pricing                             |             |                |        |                |                            |                 |            |                  |            |
|--------------------------------------------|-------------|----------------|--------|----------------|----------------------------|-----------------|------------|------------------|------------|
| PRICING_ADMIN                              |             |                |        |                |                            |                 |            |                  |            |
| Rounding Rules                             |             |                |        |                |                            |                 |            |                  |            |
| Actions View Format + - Freeze Detach Wrap |             |                |        |                |                            |                 |            |                  |            |
| Rounding Rule                              | Description | Effective Date | Status | Retail Ends In | Exception Level            | Rule Applies To |            | Rule Defaults To |            |
|                                            |             |                |        |                |                            | Price Changes   | Clearances | Price Changes    | Clearances |
| ENDSIN00                                   | Ends in 00  | 30.09.18       | Active | 00             | No Exceptions / Exclusions | ✓               | —          | —                | —          |
| ENDSIN97                                   | Ends in 97  | 30.09.18       | Active | 97             | No Exceptions / Exclusions | —               | ✓          | —                | ✓          |
| ENDSIN99                                   | Ends in 99  | 30.09.18       | Active | 99             | No Exceptions / Exclusions | ✓               | —          | —                | —          |
| ENDSIN50                                   | Ends in 50  | 17.06.19       | Active | 50             | Currency                   | ✓               | —          | ✓                | —          |

| Exceptions / Exclusions                    |                 |       |            |          |               |          |                |         |  |
|--------------------------------------------|-----------------|-------|------------|----------|---------------|----------|----------------|---------|--|
| Actions View Format + - Freeze Detach Wrap |                 |       |            |          |               |          |                |         |  |
| Department                                 | Department Name | Class | Class Name | Subclass | Subclass Name | Currency | Retail Ends In | Exclude |  |
|                                            |                 |       |            |          |               | CAD      | 45             | —       |  |

Save Save and Close Cancel

2. Select **Add** from the Action menu. The Add Rounding Rule dialog appears.

**Figure 2-2 Add Rounding Rule Dialog**

The screenshot shows the 'Add Rounding Rule' dialog box. It has a title bar with the text 'Add Rounding Rule' and a close button. The dialog is divided into several sections. On the left side, there are input fields for 'Rounding Rule' (a text box), 'Description' (a text box), 'Long Description' (a text area), 'Effective Date' (a date picker icon), 'Status' (a dropdown menu with 'Active' selected), 'Retail Ends In' (a text box), and 'Exception Level' (a dropdown menu with 'No Exceptions / Exclusions' selected). On the right side, there are two sections: '\*\*Rule Applies To' with checkboxes for 'Price Changes' and 'Clearances', and '\*\*Rule Defaults To' with checkboxes for 'Price Changes' and 'Clearances'. At the bottom right, there are three buttons: 'OK', 'OK and Add Another', and 'Cancel'.

3. Enter the rounding rule details for the following fields:
  - Rounding Rule – The identification number of the rounding rule.
  - Description – The description of the rounding rule.
  - Effective Date – The date when the Rounding Rule will become available.
  - New Retail Ends In – Used for adjusting the decimal value. This field supports 1 to 4 positions. The Ends In value assumes to start in the right most decimal position. For example, if the Retail Ends In is 9 and the currency uses two decimal positions, the value is treated as x9.
  - Exception Level – The Exception/Exclusion Level of the rounding rule. This field allows the user to decide what type or exceptions or exclusions (if any) are allowed for the rounding rule. This value drives what fields are available in the Exceptions/Exclusions table.
  - Rule Applies To – The check boxes indicating if this rounding rule applies to Clearances or Price Changes.
  - Rule Defaults To – The check boxes indicating if this rounding rule is the default for Clearances or Price Changes.
4. Click **OK** to add the new rounding rule. You are returned to the Rounding Rule tab.  
Click **OK and Add Another** to add the current rounding rule and create another.

## Manage Exceptions

The Exception or Exclusion table will show exceptions and exclusions related to the highlighted row in the Rounding Rules table. Actions taken in the Exception or Exclusion table are related to the highlighted rounding rule. For instance, when the Add action is taken on the Exception/Exclusion table, it means the Exception or Exclusion row being added is for the highlighted rounding rule.

Perform the following procedure to create exceptions or exclusions to rounding rules:

1. From the Tasks menu, select Rounding Rules under Foundation Data. The Rounding Rules tab appears.

Figure 2-3 Rounding Rules Tab

**Rounding Rules**

| Rounding Rule | Description | Effective Date | Status | Retail Ends In | Exception Level            | Rule Applies To |            | Rule Defaults To |            |
|---------------|-------------|----------------|--------|----------------|----------------------------|-----------------|------------|------------------|------------|
|               |             |                |        |                |                            | Price Changes   | Clearances | Price Changes    | Clearances |
| ENDSIN00      | Ends in 00  | 30.09.18       | Active | 00             | No Exceptions / Exclusions | ✓               | —          | —                | —          |
| ENDSIN97      | Ends in 97  | 30.09.18       | Active | 97             | No Exceptions / Exclusions | —               | ✓          | —                | ✓          |
| ENDSIN99      | Ends in 99  | 30.09.18       | Active | 99             | No Exceptions / Exclusions | ✓               | —          | —                | —          |
| ENDSIN50      | Ends in 50  | 17.06.19       | Active | 50             | Currency                   | ✓               | —          | ✓                | —          |

**Exceptions / Exclusions**

| Department | Department Name | Class | Class Name | Subclass | Subclass Name | Currency | Retail Ends In | Exclude |
|------------|-----------------|-------|------------|----------|---------------|----------|----------------|---------|
|            |                 |       |            |          |               | CAD      | 45             | —       |

Buttons: Save, Save and Close, Cancel

2. From the Rounding Rules table, select the rounding rule to which you want to add an exception or exclusion.

 **Note:**

The rounding rule selected must have had the Exception Level specified when it was initially added.

3. From the Exceptions/Exclusions table, select **Add** from the Action menu. The Add Exception or Exclusion dialog appears.

Figure 2-4 Add Exception or Exclusion Dialog

### Add Exception or Exclusion

☒ Exception ☐ Exclusion

Department

Class

Subclass

Currency

Retail Ends In

OK

OK and Add Another

Cancel

 **Note:**

Fields on the Add Exceptions and Exclusions are enabled or disabled based on the 'Exception Level' selected on the Rounding Rule. For instance, when Merchandise Hierarchy is specified as the exception level, the Currency field is disabled. When Currency is specified as the exception level, the Department, Class, and Subclass fields are disabled.

4. Enter the Exceptions/Exclusions details for the following fields:
  - Exclusion/Exception – The radio button for Exceptions and Exclusions defaults to Exceptions. When Exclusion is selected, the Retail Ends In field is cleared and disabled.
  - Department – The single department to use as an exception or exclusion to the rounding rule.
  - Class – The single class to use as an exception or exclusion to the rounding rule.
  - Subclass – The single subclass to use as an exception or exclusion to the rounding rule.
  - Currency – The currency to use as an exception or exclusion to the rounding rule.
  - Retail Ends In – Used for adjusting the decimal value. This field supports 1 to 4 positions. The Ends In value assumes to start in the right most decimal position. For example, if the Retail Ends In is 9 and the currency uses two decimal positions, the value is treated as x9.

 **Note:**

This field is enabled for exceptions but disabled for exclusions.

5. Click **OK** to add the exception or exclusion. You are returned to the Rounding Rule tab.

Click **OK and Add Another** to add the current exception or exclusion and create another.

# 3

## Configure Clearance Cadence Templates

Clearance Cadence Templates allow you to create predefined templates which tie multiple markdowns together so they can be applied to an item/location quickly in a single action. When using the template, the user will pick an initial effective date for the first markdown. Subsequent markdowns will have an effective date based on the days from initial markdown. Other attributes on the markdowns generated from the template will come from the change values on the template.

### Add Clearance Cadence Templates

Perform the following procedure to add a Clearance Cadence Template:

1. From the Tasks menu, select Clearance Cadence Templates under Foundation Data. The Cadence Templates tab appears.

**Figure 3-1 Cadence Templates**

The screenshot displays the Oracle Pricing application interface for managing Clearance Cadence Templates. The top navigation bar includes the Oracle logo, the word "Pricing", and a user profile icon labeled "PRICING\_ADMIN". The main content area is divided into two sections: "Templates" and "Cadence".

**Templates Section:**

| Template | Description                  |
|----------|------------------------------|
| CL2      | 10 - 20 - 30 Percent Off     |
| CL1      | 20 - 40 - 70 Percent Off     |
| Auto-CT  | Auto Test - Cadence Template |
| CL3      | End of Holiday Season        |
| CL4      | End of Spring Season         |
| CL5      | End of Summer Season         |
| STD      | Standard Clearance Template  |

Below the table, it indicates "Rows Selected: 1".

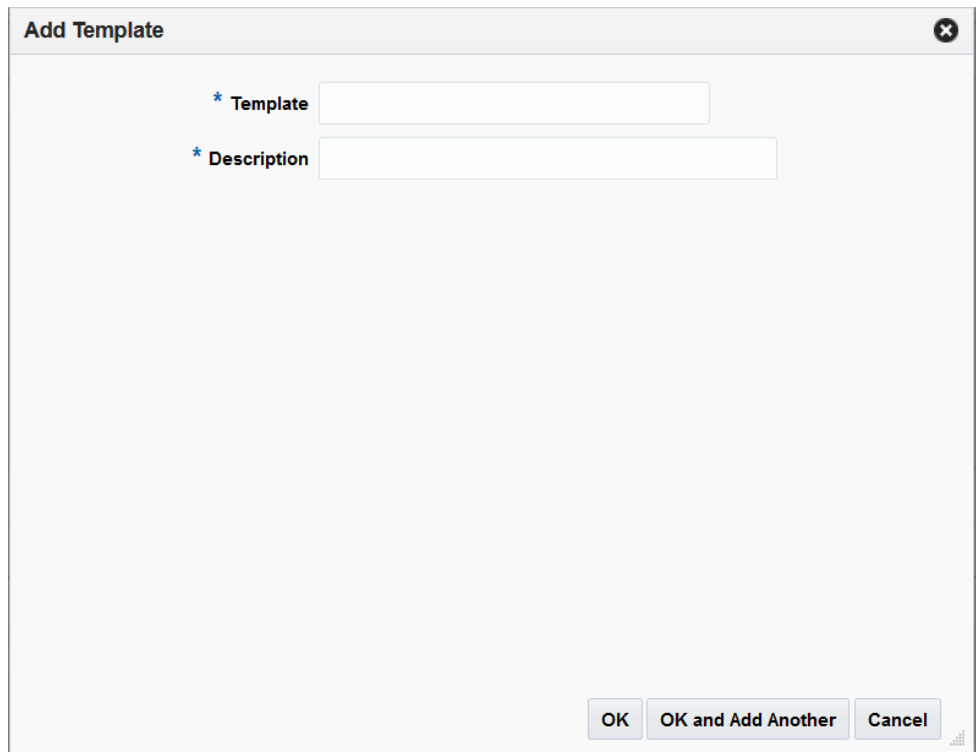
**Cadence Section:**

| Step | Markdown | Days after First | Percent Off | Rounding Rule | Rounding Rule Description                   | Reason        |
|------|----------|------------------|-------------|---------------|---------------------------------------------|---------------|
| 1    | First    |                  | 10          | CLR 1         | Rounding Rule for Clearance - No Exceptions | End of Season |
| 2    | Second   | 2                | 20          | CLR 1         | Rounding Rule for Clearance - No Exceptions | End of Season |
| 3    | Final    | 3                | 30          | CLR 1         | Rounding Rule for Clearance - No Exceptions | End of Season |

At the bottom right of the interface, there are buttons for "Save", "Save and Close", and "Cancel".

2. Select **Add** from the Action menu. The Add Template dialog appears.

Figure 3-2 Add Template Dialog

The image shows a dialog box titled "Add Template" with a close button (X) in the top right corner. Inside the dialog, there are two required fields: "\* Template" and "\* Description", each followed by a text input box. At the bottom right of the dialog, there are three buttons: "OK", "OK and Add Another", and "Cancel".

3. Enter the template details for the following fields:
  - Template – This field is used for providing the template ID.
  - Description – The description of the cadence template.

 **Note:**

Additional fields may be displayed based on system option settings.

4. Click **OK** to add the new template. You are returned to the Cadence Templates tab.

Click **OK and Add Another** to add the current template to the table and add another without leaving the Add Template dialog.

## Edit Clearance Cadence Templates

1. From the Tasks menu, select Clearance Cadence Templates under Foundation Data. The Cadence Templates tab appears.
2. From the Template table, highlight the template you want to edit and select Edit from the Actions menu. The Edit Template dialog appears.
3. From the Edit Template dialog, make any desired changes to the template.
4. When all edits are complete, click **OK**. You are returned to the Cadence Templates tab.

## Delete Clearance Cadence Templates

1. From the Templates table, highlight the template you want to delete and select **Delete** from the Action menu. The delete template confirmation dialog appears.
2. Click **Yes** to confirm the deletion. You are returned to the Cadence Templates tab.