Oracle® Retail Supply Chain Hub
User Guide

ORACLE®

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Oracle Retail Supply Chain Hub User Guide

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Preface

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

Audience

This document is intended for the users and administrators of the Oracle Retail Supply Chain Hub.

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(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.
italic	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.
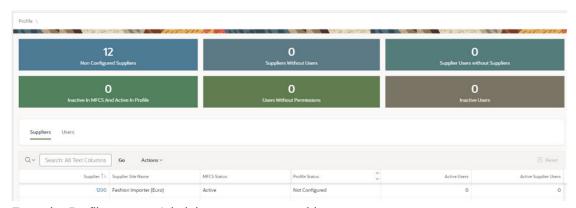
1
Supplier and User Configuration

The following topics describe the configuration for Suppliers and Users.

Configure Suppliers

All supplier sites created in Oracle Retail Merchandising Foundation Cloud Service (MFCS) appear in the Supply Chain Hub (SCH) on the Profile screen. However, they appear as Not Configured until a Retail Administrator enables the supplier site to use the application.

From the Profile screen, Administrator users are able to:

- Enable/Disable Suppliers
- Change Supplier Configurations
- Change User Configurations

Enable New Supplier
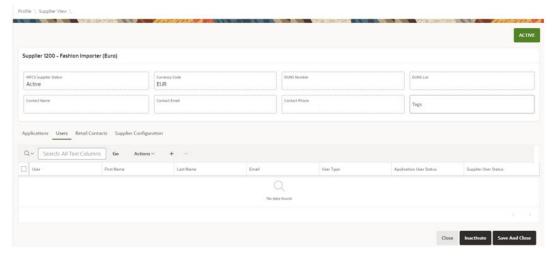
> **Note:**
>
> Only Retail Administrator users can enable/disable suppliers.

To enable a new supplier:

1. From the side menu, choose Profile.

2. In the Profile screen, select the supplier to be configured.

3. In the Configure Supplier dialog box, select the status for the supplier and what modules to enable. Click **Configure**.

4. In the Supplier View screen, Admin users can:

   • Assign tags to the supplier.

   • Enable/Disable modules to the supplier.

   • Define retail user's contacts associated with the supplier.

   • Configure supplier-specific configurations.

5. After making changes, click **Save and Close**.

Disable Supplier

To disable a supplier:

1. From the side menu, choose Profile.

2. In the Profile screen, select the supplier to be configured.

3. In the Supplier View screen, click **Inactivate**.

Configure Users

Four user types can be configured in the Supply Chain Hub:

- Retail Admin:
  - Has permission to access the Profile screen and configure suppliers and users.
- Retail User:
  - Can be assigned to use one or more modules.
  - Can be assigned to one or more suppliers and one or more departments.
  - If no suppliers and/or departments are directly associated, the user will have access to all suppliers/departments.
- Supplier Admin:
  - Needs to be assigned to at least one supplier.
  - Can change supplier user permissions.
- Supplier User:
  - Needs to be assigned to at least one supplier.
  - Will only have access related to the associated suppliers.
  - Will only have access to the assigned modules.

> **Note:**
>
> The creation of users, their allocation to suppliers, and activation/deactivation is managed in the Supplier Evaluation module, using the *Users* and *Supplier Users* tasks. The Supplier Evaluation user account is then automatically synchronized with the Supply Chain Hub user account.
>
> For more details, see the *Oracle Retail Supply Chain Collaboration Cloud Service Integration User Guide* and *Oracle Retail Supply Chain Collaboration Cloud Service Administration Guide*.

There are two ways to view the association of a user with a supplier.

View the Supplier Screen

To view a supplier's user allocation:

1. From the side menu, choose Profile.
2. In the Suppliers tab, select the supplier.
3. In the Supplier View screen, select the Users tab.

View the User Screen

To view a user's supplier allocation:

1. From the side menu, choose Profile.
2. In the Users tab, select the user.
3. In the User View screen, select the Suppliers tab.

Inactivate User

> **Note:**
>
> The inactivation of a user is managed in the Supplier Evaluation module.
>
> For more details, see the *Oracle Retail Supply Chain Collaboration Cloud Service Integration User Guide* and *Oracle Retail Supply Chain Collaboration Cloud Service Administration Guide*.

Change User Configurations

To change user configurations:

1. From the side menu, choose Profile.

2. In the Profile screen, select the Users tab.

3. Select the user to change configurations.

4. The following configurations can be changed:

   - Application Access - The modules the user has access to and if they should receive notifications from this module.

   - Application Permissions - The permissions the user has for each module.

     > **Note:**
     >
     > Application Permissions options are different by application, some of the valid values are: No Access, View only, Edit, or Approve. However some applications may have all permission levels.

   - Departments - The department data the user has access to. This will be used as data-level security in the different modules.

     If no department is selected, the user will have access to data from all departments.

   - Locations - The list of Locations the user has access to.

     If no location is selected, the user will have access to data from all locations.

     > **Note:**
     >
     > Location level security is only available for: Appointments Management, Quality Control, Supplier Penalties, and Retail Price.

   - User Groups - User Groups the user belongs to.

> **✎ Note:**
>
> User Groups are only used by Cost Changes Management for Custom Workflows using the Dynamic Execution Framework. For more details, see the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*. Also see the *Oracle Retail Merchandising Cloud Extensions Framework Implementation Guide* available on My Oracle Support.

5. Click **Save and Close**.

2

Common Functionality

The following topics describe the common functionality available across all the Supply Chain Hub modules.

Homepage

When logging in to the Supply Chain Hub, the user has access to the Homepage. From this page, the user is able to:

- Navigate to the different modules.
- Access the Troubleshooting/FAQ pages.
- Access Operational News.
- Access Queries.
- View notifications.
- View Dashboards.
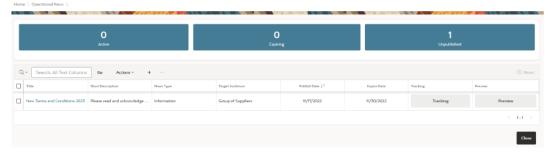
Operational News

Operational News allows retailers to broadcast messages to suppliers, who can view and acknowledge those messages.

Create Operational News
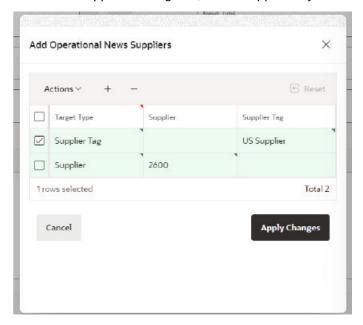
To create operational news:

1. From the Homepage screen, select Operational News.
2. In the Operational News screen, click the + icon.
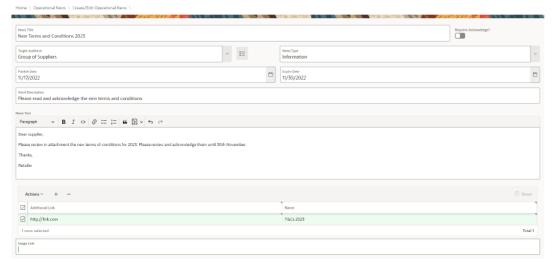
3. In the Create/Edit Operational News screen, add the following:

   a. News Title.

   b. Choose if the News requires Acknowledgment from the Suppliers.

   c. Target Audience. Valid options:
      - All Suppliers
      - Group of Suppliers

In the Add Suppliers dialog box, select suppliers by ID or Tag.

d. News Type. Valid values: Information or Alert.

e. Publish Date - Date suppliers will first see the message.

f. Expire Date - Date until the message will be displayed.

g. Short Description - Short description of the message.

h. News Text - Complete message.

i. Links to add to the message.

j. Image Link - Image that can be associated with the message.

4. Click **Add**.

Manage Operational News

From the Operational News screen, retail users are able to:

• Identify what suppliers have viewed/acknowledged the message.

- Edit the message.
- Preview the message.
- Remove the message.

View and Acknowledge Operational News

Supplier users are able to access Operational News from:
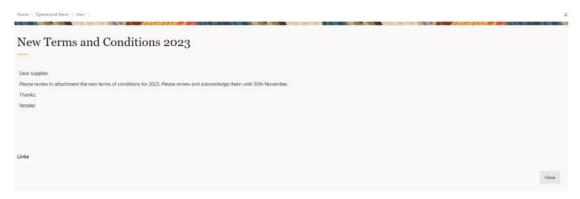
- Homepage > Operational News section

- Homepage > Operational News link

If the message requires Acknowledgment, supplier users have to click **Acknowledge** inside the message.

Queries

As part of the collaboration tools available within Supply Chain Hub, users and suppliers can communicate by sending messages back and forth to each other.

List Queries

Users can view all the queries raised by the supplier/retailer associated with their entities. To view the list of queries:

1. From the Homepage, view the Latest Queries section or click **Queries**.

2. View all queries and apply different filters to identify the queries to process.
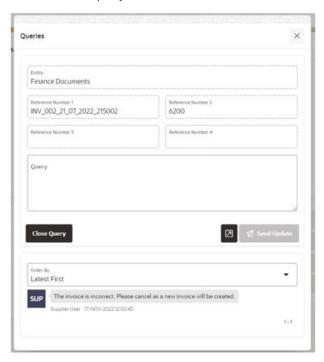
3. To view the query details, click **Query ID**.

View and Reply to Query

By selecting a query, users can:

- View all previous messages and replies related to the entity.
- Jump to the entity to perform an action.
- Reply to the previous message.
- Close the query.
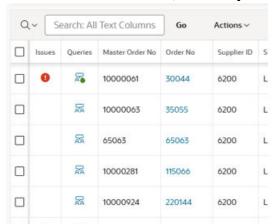
Raise a New Query

To raise a new query:

1. Raising a new query can be done directly in the Entity from two different places:

a. From the Module Dashboard, click the Queries icon in the table.
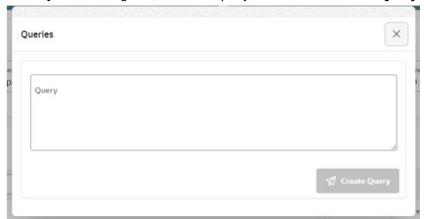
> **Note:**
>
> On the Dashboard screens by clicking the Queries header in the table, it is possible to filter by Query Status: No Queries, Pending Reply, Open, and Closed.

b. Use the Query button available in all entities:

   i. Navigate to Module and go the Entity Detail.

   ii. Click **Query**. If there is an already open conversation, the button will be highlighted.

2. In the Queries dialog box, enter the query text and click **Create Query**.

Attachments

It is possible to add, remove, or download attachments on most applications of Supply Chain Hub. On the available entities, click the icon when available to:

- Attach the File by clicking the + icon.

- Remove attachments by clicking the – icon.

- Download the file by clicking the link in the File Name column.
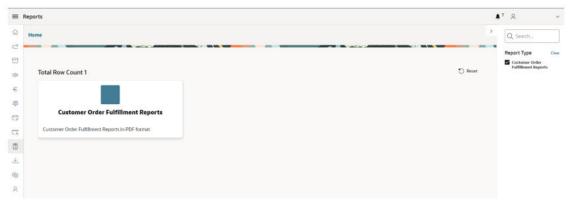
> **Note:**
>
> Currently, the Attachments functionality is not available for Items Management.

Reports

It is possible to share Reports with Suppliers. These reports can be configured and made available using the Reports page on the left side menu.

Open the Report page from the left side menu. The following page is displayed.

The reports can be filtered on the facet search directly using the text over the Report Names and Descriptions or using the Report Type. To get the report:

1. Filter or click **Report to Download**.

2. Select the filters of the report (if necessary).

3. Click **Get Report**.

> **Note:**
>
> Supply Chain Hub does not provide any Reports out of the box. The Reports must be configured in the Reports module to be made available on the screen. For more details, see the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*.

3

Procure to Pay

The Procure to Pay module allows retailers and suppliers to collaborate on the creation and maintenance of the following documents:

- Purchase Order Management
- Shipment Management
- Finance Document Management

Purchase Order Management

The Procure to Pay module allows retailers and suppliers to collaborate on the creation and maintenance of Purchase Orders (PO). If given permissions, users are able to:

- View and download Purchase Orders.
- Acknowledge Purchase Orders.
- Create new Purchase Orders using the UI.
- Propose changes to Purchase Orders.
- Approve, reject, cancel, or make changes to Purchase Orders.
- Upload changes to Purchase Orders or create Purchase Orders.

View and Download Purchase Orders

Users are able to view all Approved Purchase Orders from MFCS or those still in the creation/change process within Supply Chain Hub for the suppliers associated with the user.

The users are able to:

- Apply filters directly in the results table or using the Right Side menu. Filtering can be applied by: Status, Supplier, Purchase Order, or Item.

> **Note:**
>
> For Purchase Order and Item Filtering. multiple values can be entered. By default, Space is the delimiter of IDs, however it can be modified using a System Parameter. For details on how to change it, see the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*.

- Order results directly in the table.
- Move between pages if more records are available than the configured records per page.
- Perform multiple actions to the Purchase Orders:
    - View or edit a PO (by clicking on the ID).
    - Create a new PO.

- Upload a PO.

- Download a PO (one or multiple POs selected).

- Reject a PO (one or multiple POs selected).

- Acknowledge a PO (one or multiple POs selected).

- Create an Advance Shipment Notice (ASN) from a PO (one or multiple POs selected).

- Create an invoice from a PO (one or multiple POs selected).

- Create/view/reply to queries (by clicking the Queries Icon).

- View issues of POs (by clicking the issues icon when available).

> **Note:**
>
> Additional Custom View Only fields can be added to display additional information. To enable this feature, a Custom View needs to be modified and the additional fields enabled. See the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide* for the available views. For details on how to enable the additional fields, see the *Oracle Retail Merchandising Cloud Extensions Framework Implementation Guide* on My Oracle Support.

View a Purchase Order

To view a purchase order:

1. From the side menu, choose Procure to Pay.

2. In the Purchase Orders tab, select the Purchase Order to view.

3. Once the Detail Screen opens, the data is displayed in two tabs:

   - Items

     Contains the Item Level information with all the items included on all the deliveries along with the total quantity.

   - Deliveries

     Contains two tables:

– Orders:

* Displays a list of deliveries per location.

> **Note:**
>
> Additional Custom View Only fields can be added to display additional information. To enable this feature, a Custom View needs to be modified and the additional fields enabled. See the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide* for the views available. For information on how to enable the additional fields, see the *Oracle Retail Merchandising Cloud Extensions Framework Implementation Guide* on My Oracle Support.

* PO Cost Details can be displayed by selecting one order and clicking View Order Details. A dialog box displays the Cost Components and HTS Assessments of the PO in MFCS.

> **Note:**
>
> By default, View Cost Details is disabled and can be enabled using a System Parameter. See the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*. Data is only available once a PO has been interfaced into MFCS.

– Order Items

Displays a list of the items of the selected order.

Download Purchase Orders

To download purchase orders:

1. From the side menu, choose Procure to Pay.

2. In the Purchase Orders tab, select one or more Purchase Orders to download.

3. Click **Download PO**. A spreadsheet is downloaded containing the selected PO data.

Acknowledge Purchase Orders
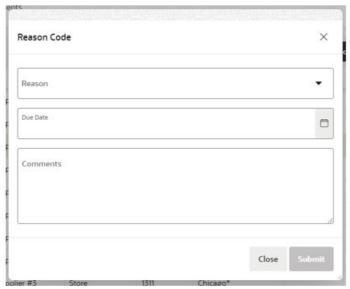
This action is only available to Supplier Users.

To acknowledge purchase orders:

1. From the side menu, choose Procure to Pay.

2. In the Purchase Orders tab, select one or more Purchase Orders to acknowledge.

3. Click **Acknowledge PO**.

4. In the Reason Code dialog box, provide a reason code and any comments if needed. Click **Submit**.
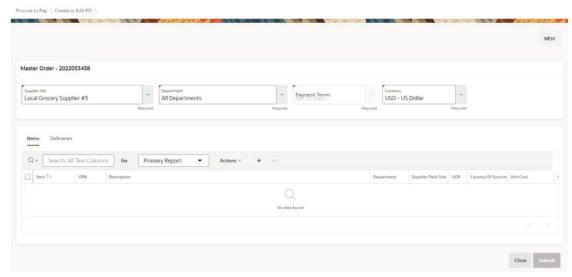
5. In the Purchase Orders screen, the Acknowledged flag is updated for the selected POs.

> **Note:**
>
> The Acknowledgment flag is only stored in Procure to Pay and not interfaced to MFCS.

Create New Purchase Orders using the UI

If given permission, users are able to create new Purchase Orders in Suppy Chain Hub.
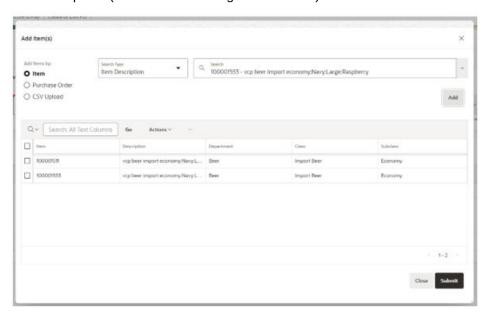
To create purchase orders:

1. From the side menu, choose Procure to Pay.

2. In the Purchase Orders tab, click **Create PO**.

3. In the Create or Edit PO screen, complete the following information:

    a. Select Supplier Site (only Supplier Sites associated with the user are shown).

    b. Select Department (if PO is associated with a single department).

    c. Payment Terms/Currency/Exchange Rate will default but can be amended.

4. In the Items tab, add the items. The following options are available to add items:

- Item (using Style/SKU ID, description, VPN, and Barcode)
- Purchase Order (copy items from another order)
- CSV upload (select file containing a list of items)
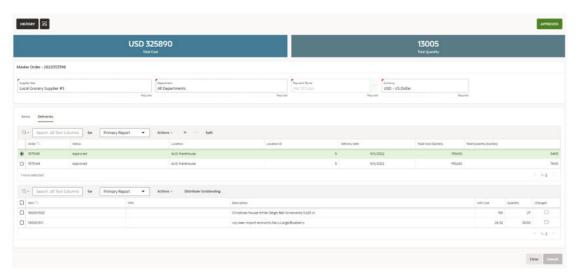
5. Review and complete the item information:

- Supplier Pack Size (defaulted)
- Unit Cost (defaulted)
- Quantity (needs to be entered)

6. In the Deliveries tab, click the + icon.

7. Add the PO specific information:

- Location
- Not Before Date / Not After Date / Delivery Date

8. Add the quantity for the delivery:

- Item by Item
- Using the Distribute Outstanding button

9. Add additional deliveries if required (repeat Steps 6-8).

10. Click **Submit**. If the user has approval permissions, it will be automatically moved to Approve status; otherwise, it will go to New status, to be approved by a user with approval permissions.

Propose Changes to Purchase Orders

When the Purchase Order is in Approved status, the supplier can propose changes to the Purchase Order:

1. From the side menu, choose Procure to Pay.

2. In the Purchase Orders tab, select the PO that requires changes.

3. In the Create or Edit PO screen, click **Edit**.

4. Make the changes required to the PO. The following actions are supported:

    • Add items.

    • Remove items.

    • Amend dates, quantities, and unit cost.

    • Change deliveries.

    • Add new deliveries.

    • Split deliveries.

    • Remove deliveries.

5. After the changes are completed, click **Submit**.

6. In the Reason dialog box, complete the Reason Code, Due Date, and Comments. Then click **Submit**.

Approve/Reject/Cancel PO or Changes

Depending on the status of a PO, a user with Approval permissions can perform different actions:
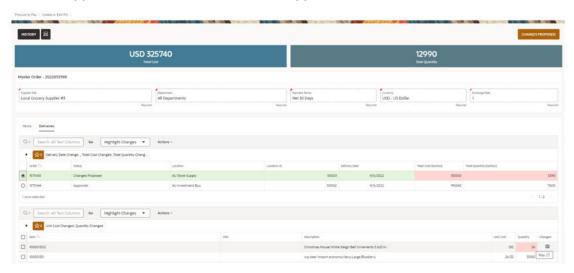
• If the PO is in New or Changes Proposed status, the user can review the PO and decide to Approve or Reject it.

• If the PO is in Approved Status, the user can Cancel the PO.

1. From the side menu, choose Procure to Pay.

2. In the Purchase Orders tab, select the POs to Approve/Reject/Cancel.

3. Click **Approve/Reject/Cancel**.

Alternatively, the user can do the approval/cancel from within the PO itself:

1. From the side menu, choose Procure to Pay.

2. In the Purchase Orders tab, select the PO to review.

3. In the Create/Edit Purchase Order screen, click **Edit**.

4. View the changes highlighted and make additional changes or simply approve/reject/ cancel the changes.

5. Click **Approve All/Cancel All** in the PO or **Approve/Cancel**.

Upload PO Changes or PO Creation

In addition to using the front-end screens to create/change POs, the users can choose to perform the actions using the Spreadsheet upload. This allows them to do multiple changes at the same time, in a single step.

Changes to Existing POs

To make changes to an existing PO:

1. From the side menu, choose Procure to Pay.

2. In the Purchase Orders tab, select the PO which requires changes.

3. Click **Download PO**.

4. Make the changes in the spreadsheet.

5. Click **Upload PO**.

6. In the Upload dialog box, select the file with the changes.

7. Click **Upload**.

New PO by Using Upload

To create a new PO by using upload:

1. From the side menu, choose Upload and Download.

2. Select the Download Blank tab.

3. Choose Template Source > Procure to Pay and Template Type > SPPP Purchase Order.

4. Click **Download**.

5. Create the PO by using a spreadsheet.

6. Upload the PO by using the Procure to Pay screen or in the Upload and Download screen.

a. Select the Upload tab.

b. Choose Template Source > Procure to Pay and Template Type > SPPP Purchase Order.

c. Choose the file.

d. Click **Upload**.

Shipment Management

The Procure to Pay module allows retailers and suppliers to collaborate on the creation and maintenance of shipments (ASNs). If given permissions, users are able to:

• View and download shipments.

• Create new shipments using the UI.

• Propose changes to a shipments.

• Upload shipment changes or a shipment creation.

• Create/view/reply to queries (by clicking the Queries icon).

• View issues of ASNs (by clicking the issues icon when available).

View and Download Shipments

Users can view all shipments created/updated within SCH for the suppliers associated with the user.

The users can:

• Apply filters directly in the results table or use the Right Side menu. Filtering can be applied by: Status, Supplier, Purchase Order, and Item.

> **Note:**
>
> For Purchase Order and Item Filtering, multiple values can be entered. By default, Space is the delimiter of IDs, however it can be modified using a System Parameter. See the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide* for details on how to change filters.
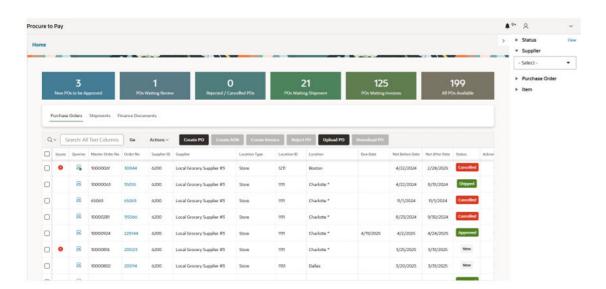
• Order results directly in the table.

• Move between pages if more records are available than the configured records per page.

• Perform multiple actions to shipments:

   – View or edit a shipment (by clicking the ID).

   – Create a new ASN.

   – Upload an ASN.

   – Create/view/reply to queries (by clicking the Queries icon).

   – View issues of ASNs (by clicking the issues icon when available).

> **Note:**
>
> Additional Custom View Only fields can be added to display additional information. To enable this feature, a Custom View needs to be modified and the additional fields enabled. See the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide* for the views available. For how to enable the additional fields, see and the *Oracle Retail Merchandising Cloud Extensions Framework Implementation Guide* on My Oracle Support.

Create New Shipment

Supplier users (or retail users if replacing suppliers) are able to create new ASNs using the Supply Chain Hub. The users can create new shipments by starting from one of two options.

To create a new shipment using data from a PO:

1. From the side menu, choose Procure to Pay.

2. In the Purchase Orders tab, select one or more POs.

3. Click **Create ASN**. This will default the PO data to the ASN.

> **Note:**
>
> Using this method, the shipment is created without containers. If containers are required, use the following method.

To create a new shipment starting with an empty ASN:

1. From the side menu, choose Procure to Pay.

2. In the Shipments tab, click **Create ASN**. The user starts with an empty ASN.

   To create the ASN:
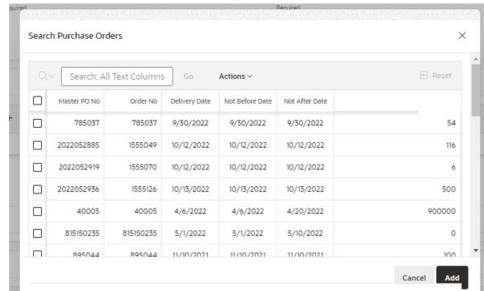
   a. If available, enter the ASN; otherwise, skip to the next step.

   > **Note:**
   >
   > Supplier-controlled ASNs are disabled by default. The ASN is generated from a sequence. If enabled, users have to input the ASN manually.
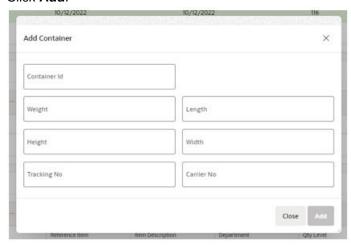
   b. Select the Shipment Date.

   c. Select the Estimated Arrival Date.

   d. Select the Supplier.

   e. Select the Location.

   f. Indicate if the ASN is at the Item Level or Container Level.

   g. Select the POs by clicking the + icon.

h. In the Search Purchase Orders screen, select the POs and click **Add**.

i. If the ASN is created at the Container Level, create the containers by clicking the + icon.

    i. Enter the Container ID, Weight, Length, Height, Width, Tracking No, and Carrier No.

    ii. Click **Add**.

    iii. Add items and quantities to each container.

j. By default, all items on the PO are added to the ASN. Items can also be added/removed using the +/- buttons.

k. Define the units for each item or click **Default Balance** to default all outstanding quantities from Balance to the Units.

> **✎ Note:**
>
> Items with no shipped units will be ignored. Only items with shipped units will be saved and sent to MFCS.

l. Click **Submit**.
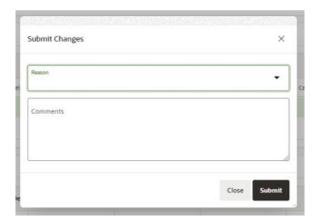
> **Note:**
>
> Shipments created in Procure to Pay for Customer Orders (Direct to Customer) will not contain any customer order information when interfaced to MFCS.

View/Edit Shipment

Until the ASN is received, users are able to change/edit the ASN.

To edit the ASN:

1. From the side menu, choose Procure to Pay.
2. In the Shipments tab, select the ASN to be edited.
3. In the Create/Edit ASN screen, click **Edit**.
4. Apply the changes required. It is possible to:
   - Add/Remove POs.
   - Add/Remove items.
   - Amend item quantities.
   - Amend containers.
5. Click **Submit**.
6. In the Submit Changes dialog box, provide the Reason and Comments. Then click **Submit**.

Cancel Shipment

Users can cancel shipments until they are marked as received in the system.

To cancel a shipment:

1. From the side menu, choose Procure to Pay.
2. In the Shipments tab, select the Shipments to be canceled.
3. Click **Cancel ASN**.

Upload Shipment Changes or Creation

In addition to using the front-end screens to create/change ASNs, the users can choose to perform the actions using a spreadsheet upload. This allows them to do multiple changes at the same time, in a single step.

Changes to Existing ASNs

To change an existing ASN:

1. From the side menu, choose Procure to Pay.

2. In the Shipments tab, select the Shipments that require changes.

3. Click **Download ASN**.

4. Make the changes in the spreadsheet.

5. Click **Upload ASN**.

6. In the Upload dialog box, select the file with the changes.

7. Click **Upload**.

New ASN using Upload

To create a new ASN using upload:

1. From the side menu, choose Upload and Download.

2. Select the Download Blank tab.

3. Choose Template Source > Procure to Pay and Template Type > SPPP Advanced Shipment Notice.

4. Click **Download**.

5. Create the ASNs using a spreadsheet.

6. Upload the ASNs using the Procure to Pay screen or in the Upload and Download screen:

   a. Select the Upload tab.

   b. Choose Template Source > Procure to Pay and Template Type > SPPP Advanced Shipment Notice.

   c. Choose the file.

   d. Click **Upload**.

Finance Document Management

The Finance Documents section enables users to view and take action on all the financial documents that are in the user's care. The available actions are:

- View the fiance documents:

  – Search the finance documents list using free text or selecting column-specific values.

  – Apply filters to the finance documents.

- Upload a financial document. It is possible to upload a file with multiple finance documents.

- Create a document.

- Create/view/reply to queries (by clicking the Queries icon).

> **Note:**
>
> Additional Custom View Only fields can be added to display additional information. To enable this feature, a Custom View needs to be modified and the additional fields enabled. See the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide* for the views available. For details on how to enable the additional fields, see the *Oracle Retail Merchandising Cloud Extensions Framework Implementation Guide* on My Oracle Support.

Create Finance Document

The Supply Chain Hub supports the ability to create the following documents:

- Merchandise Invoices
- Credit Notes

To create a finance document:

1. From the side menu, choose Procure to Pay.
2. In the Finance Documents tab, click **Create Document**.
3. To create a document, the first step is to create the document header. The document header needs the following information to be entered:
   - Document - the field where the document identifier (for example, invoice number) is entered.
   - Document type - choose between the available values:
     – Credit Note
     – Merchandise Invoice
   - Credit Note Request - If the Document Type is Credit Note, the user can select from a list of Credit Note Requests. This defaults the PO/RTV associated with the Credit Note.
   - Supplier - supplier issuing the document. The user can choose one of the suppliers they have access to.
   - Location - which location is being invoiced.
   - Document Date - date the document was issued.
   - Comments - any comments related to the document being issued.

4. When all required fields are entered, click **Validate**.

5. After validation, the user can opt to attach a file.

6. The user needs to complete Document Details, which are divided into three sections:

   • Purchase order/RTV

   • Items

   • Tax Breakdown

7. For PO/RTVs, the user can select from a list of RTVs or POs.

8. After selecting the PO/RTVs, the system defaults the data based on the PO/RTV selected.

9. The user can still amend the defaulted invoice cost and invoice quantity and add items that were not on the original document if required.

10. The user can review the Tax Breakdown.

11. When ready to submit, click **Submit**.
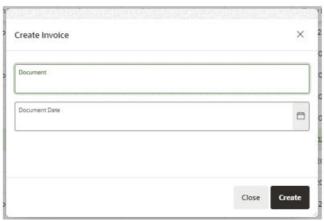
> **Note:**
>
> Tax information will be different depending on MFCS Tax configuration.

Create Invoice from PO
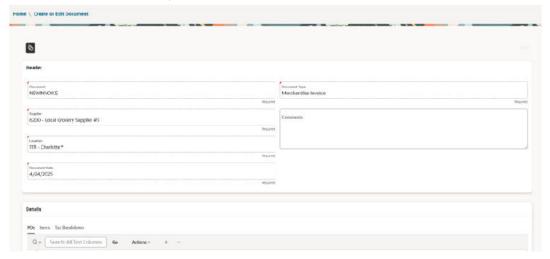
In addition to starting an Invoice by inputting all details, it is possible to create a Merchandise Invoice directly from one or more POs, using the PO data to default to the invoice:

1. From the side menu, choose Procure to Pay.

2. In the Purchase Orders tab, select the POs to be invoiced.

3. Click **Create Invoice**.

4. In the Create Invoice dialog box, enter the Document ID and Document Date. Then click **Create**.

5. In Create or Edit Document, review that all the data is correct.

6. If available, upload an attachment (for example, PDF) containing the Invoice from the supplier.

7. If necessary, the user can edit the Invoice Quantity and Invoice Cost.

8. Click **Submit**.

View Document

Users can view documents that are associated with the suppliers linked to the user, even if they were not created using Supply Chain Hub. This allows the users to see the status of the document, including if there are any discrepancies.

To view a document:

1. From the side menu, choose Procure to Pay.

2. In the Finance Documents tab, select the documents to be viewed.

3. If there are discrepancies, the user is able to see the differences.

Upload Financial Document

3-16

In addition to using the front-end screens to create Finance Documents, the users can choose to do the creation using a Spreadsheet upload. This allows them to do multiple creations at the same time, in a single step.

To upload a financial document:

1. From the side menu, choose Upload and Download.

2. Select the Download Blank tab.

3. Choose Template Source > Procure to Pay and Template Type > SPPP Documents.

4. Click **Download**.

5. Create the documents using a spreadsheet.

6. Upload the documents using the Procure to Pay screen or in the Upload and Download screen:

   a. Select the Upload tab.

   b. Choose Template Source > Procure to Pay and Template Type > SPPP Documents.

   c. Choose file.

   d. Click **Upload**.

4

Return to Vendor Management
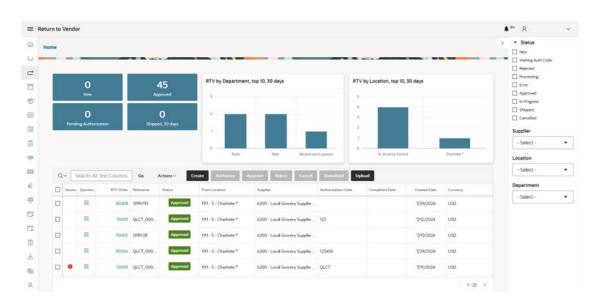
As part of the collaboration functionality provided by Supply Chain Hub, the Return to Vendor (RTV) module allows retailer and supplier users to create returns to vendor. Depending on the user's permission, they are able to access the following functionality:

- View RTVs created in MFCS and in Supply Chain Hub.
- Create and edit RTVS.
- Add RTV Authorization code.
- Edit RTV Status - Approve, Reject, and Cancel.
- Download and upload RTVs.
- Create/view/reply to queries (by clicking the Queries icon).
- View issues of RTVs (by clicking the issues icon when available).

View RTVs

The retailer and supplier users are able to:

- Search for RTVs:
    - Right-Side menu to filter the RTV table by:
        * Status
        * Supplier
        * Location
        * Department
    - Directly on the RTV table using the table headers.
- View Dashboard tiles with a count of RTVs by Status (New, Pending Authorization, Approved, and Shipped) to quickly identify potential status to check.
- View Chart with a count of RTVs created in the last 30 days, grouped by Department and by Location. These graphics display the top 10 RTVs count on the conditions described and in following status: Approved, In Progress, Shipped, Canceled, and Error.
- Move between pages if more records are available than the configured records per page.
- Perform multiple actions to the RTVs:
    - View or edit a specific RTV (by clicking the RTV Order).
    - Create a new RTV.
    - Authorize, approve, reject, and cancel (one or multiple RTVs selected).
    - Download (one or multiple RTVs selected).
    - Upload (one or multiple RTVs).
    - Create/view/reply to queries (by clicking the Queries icon).
    - View issues of RTVs (by clicking the issues icon when available).

ORACLE
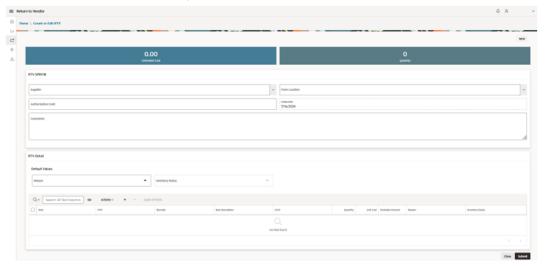
Create and Edit RTVs

If given permission, users are able to create new RTVs using Supply Chain Hub and edit them until they are sent to MFCS. Once in MFCS, an RTV can only be canceled.

Create RTVs

To create an RTV:

1.   From the side menu, choose Return to Vendor.

2.   In the Return to Vendor screen, click **Create**.

3.   The RTV will be in New status and there are several steps that need to be followed, first on the header:

   a.   Select the Supplier and the Location.

   b.   The Authorization Code is not mandatory during creation, but it might be required for approval.
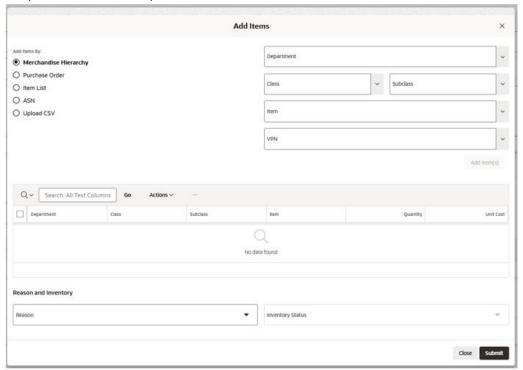
> **✎ Note:**
>
> Authorization Code may be required for Approval based on MFCS Supplier Configuration. If Authorization is required, the status of the RTV may change to Awaiting Supplier Authorization before the RTV is approved. RTVs can only be created for Suppliers set up in MFCS with Returns allowed.

    c.   Enter Comments (Optional).

4.   On the Details section:

    a.   Select a Reason and Inventory Status (if Reason is Unavailable). Defaults are optional and are only used as defaults when adding items; they can still be changed on the details table at the item level or during Add Items (Optional).

    b.   To add items, click the + icon on the RTV Detail Table. A dialog box is displayed where it is possible to add multiple items to the RTV.

    c.   There are several ways to add items to the RTV:

       •   Merchandise Hierarchy

       •   Purchase Order

       •   Item List

       •   ASN

       •   Upload CSV (File with just one column with the Item IDs)

d. From the table, it is possible to remove items before submitting them into the RTV Detail table.

e. Select a Reason and Inventory Status (if Reason is Unavailable). Click **Submit** to add the items to the RTV.

> **Note:**
>
> It is not possible to add duplicated Items with the same Reason and Inventory status or submit a RTV without Items.

5. Once all mandatory fields have been entered, the RTV can be submitted by clicking **Submit**. This action displays a confirmation dialog box that submits the RTV.

After the RTV submission, depending on user permissions and RTV Details, the RTV may be at following status:

• New (User with Edit permission and RTV Supplier without Authorization Required).

• Waiting Auth Code (User with Edit or Approve permission. RTV Supplier has Authorization Required and Authorization code was not filled).

• Approved (Only possible for users with Approve permissions).

Edit RTVs

To edit an RTV:

1. On the Return to Vendor screen, the user can edit the RTV details by selecting the RTV Order number.

2. The Create and Edit RTV page is displayed.

3. Click **Edit** to change the screen into Edit Mode.

4. Update the RTV Details.

> **Note:**
>
> In Edit mode, Supplier and Location are not editable. If these need to be changed, a new RTV needs to be created. During Edit Mode on the RTV header, the user can always see the RTV History, Add/Remove and/or View Attachments, View RTV Errors, and start and/or reply to Queries. These top buttons are not visible in Create mode.

Authorize RTV

It is possible for a supplier or retailer user to add/remove the Authorization code to one or more RTVs directly from the Dashboard screen.

To authorize an RTV:

1. On the Return to Vendor Dashboard screen, find the RTVs from the RTV Detail table.
2. Select one or more RTVs to authorize.

> **Note:**
>
> If several RTVs are selected, the same Authorization code will be updated on all of them.

3. Click **Authorize** and the Authorization dialog box is displayed.

4. Enter the Authorization code.
5. Click **Authorize**.

Once confirmed, the dialog box will close and the RTVs are updated.

The RTV status can also be automatically updated with this action if the user has Approve permission and the previous RTV status was New or Waiting Auth Code. The RTV status will be updated to Approved.

Approve RTVs

Retailer and Supplier users with Approval permission can approve RTVs.

To approve RTVs:

1. If a RTV is in New or Waiting Auth Code status, a user can review the RTV and approve it.
2. From the side menu, choose Return to Vendor.
3. On RTV Home screen, select one or more RTVs to approve and click **Approve**.

A confirmation dialog box is displayed.

4. Click **Approve**.

Alternatively, the same action can be done on the Create or Edit RTV screen while viewing a specific RTV.

> **Note:**
>
> Approved RTVs cannot be updated. Users can only cancel Approved RTVs.

Reject RTVs

Retailer and Supplier users with Approval permission can reject RTVs.

To reject RTVs:

1. If an RTV is in New or Waiting Auth Code status, a user can review the RTV and reject it.

2. From the side menu, choose Return to Vendor.

3. On the RTV Home screen, select one or more RTVs to reject and click **Reject**. A confirmation dialog box is displayed.

4. Click **Reject**.

A dialog box is displayed to select the reason and add a comment for the rejection. Comments are only mandatory if the Reason is Other.

Alternatively, a RTV can also be rejected on the Create or Edit RTV Screen while viewing a specific return to vendor.

> **Note:**
>
> Rejected RTVs can be updated and resubmitted.

Cancel RTVs

Retailer and Supplier users with Approval permission can cancel RTVs.

To cancel RTVs:

1. If a RTV is in Approved status, a user can review the RTV and decide to cancel it.

2. From the side menu, choose Return to Vendor.

3. On the RTV Home screen, select one or more RTVs to cancel and then click **Cancel**.

   A confirmation dialog box is displayed.

4. Click **Cancel RTV.**

5. A dialog box is displayed to select the reason and add a comment for the cancellation. Comments are only mandatory if the Reason is Other.

6. Click **Submit**.

Alternatively, a RTV can also be canceled on the Create or Edit RTV screen while viewing a specific return to vendor.

> **Note:**
>
> Canceled RTVs cannot be updated.

Download RTVs

To download RTVs:

1. On the Return to Vendor home screen, find the RTVs to download using the different filters available.
2. Select one or more RTVs.
3. Click **Download** to download the RTV spreadsheet.

Upload RTVs

Changes to existing RTVs or new RTVs can be uploaded.

Changes to Existing RTVs
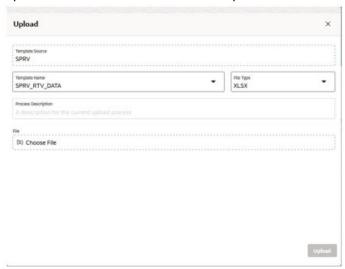
Alternatively to using the front-end screen to create or edit RTVs, users can choose to do the same actions using the Spreadsheet upload. This allows them to make multiple changes at the same time, in a single step.

To make changes to existing RTVs:

1. From the side menu, choose Return to Vendor.
2. On the Return to Vendor home screen, find the RTVs to download using the different filters available.
3. Select one or more RTVs.
4. Click **Download**.
5. Make all the necessary changes on the downloaded spreadsheet and save it.

a. Click **Upload** to open a dialog box on the Return to Vendor home screen or in the Upload and Download screen on the Upload tab.

b. Choose Template Source > SPRV, Template Name > Return to Vendor, and Template Type > XLSX.

6. Choose the file.

7. Click **Upload**.

> ✎ **Note:**
>
> Only users with the Edit and Approve permission can upload RTVs.

New RTVs

To create new RTVs:

1. From the side menu, choose Upload and Download.

2. Select the Download Blank tab.

3. Choose Template Source > Return to Vendor and Template Type > XLSX.

4. Click **Download**.

5. Choose Template Source > Return to Vendor and Template Type > XLSX.

6. Choose a file.

7. Click **Upload**.

> ✎ **Note:**
>
> Only users with the Edit and Approve permission can upload RTVs.

5

Inventory and Sales
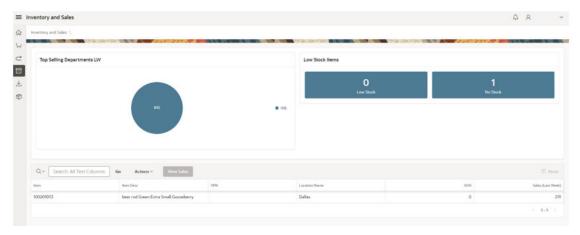
In Supply Chain Hub, it is possible to share visibility of Inventory and Sales with authorized suppliers. These suppliers, for their items, are able to:

- View Dashboards with:
    - Top Selling Departments (only available to Retailers)
    - Low Stock Items
- View the previous end of day Stock On Hand position per location.
- View Last Week Sales per location.
- View the Current Weeks Forecast (if available).
- View specific Item/Location sales details.
- Download Inventory and Sales position.

View/Download Inventory and Sales

To view/download inventory and sales:

1. From the side menu, choose Inventory and Sales.
2. Choose a Supplier from the facet search menu. If the user only has access to one supplier, the Supplier is automatically chosen.
3. Apply any filters necessary on the facet or directly on the table.
4. If a file with the data is required, click Actions and then Download to generate a file.
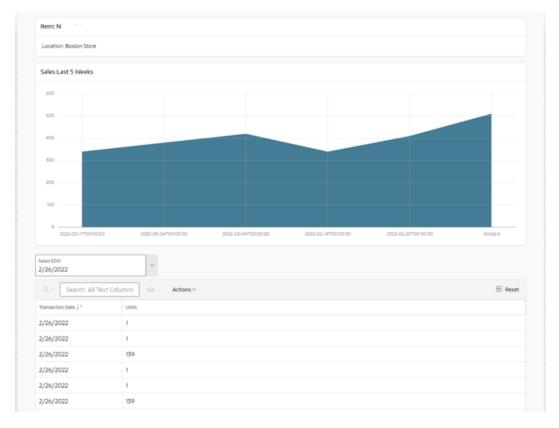
View Sales Detail

To view sales details:

1. From the side menu, choose Inventory and Sales.
2. In the Inventory and Sales screen, view and apply different filters and select an item.

3. Click **View Sales**.

4. In the View Sales screen, select the week using the EOW drop-down list to view the sales details.

6
Items Management

The Items module allows retailers and suppliers to collaborate on the creation and maintenance of items. If given permissions, users are able to:
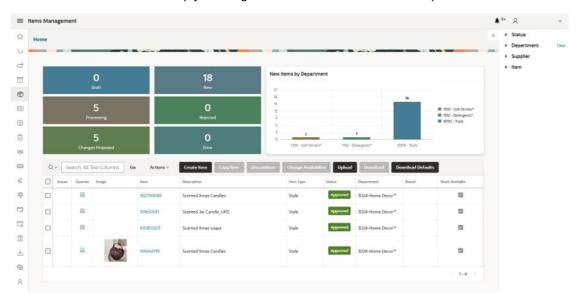
- View and download items.
- Copy items.
- Discontinue items.
- Create new items using the UI.
- Propose changes to items.
- Change availability of items.
- Approve/reject items or changes.
- Upload new items or update existing items.

View and Download Items

The users are able to:

- Search for items:
    - Use the right-side menu to filter the table by:
        * Status
        * Department
        * Supplier
        * Item (Item can be any item number: MFCS Item, Barcode, or VPN)
    - Directly on the table by using the table headers
- View Dashboards with a count of several item statuses to quickly identify potential status to check.
- Move between pages if more records are available than the configured number of records per page.
- Perform multiple actions to the items:
    - View or edit an item (by clicking the ID).
    - Create a new item.
    - Upload an item.
    - Download an item (one or multiple items selected).
    - Reject an item (one or multiple items selected).
    - Approve an item (one or multiple items selected).
    - Discontinue an item (one or multiple items selected).
    - Change availability of an item (one or multiple items selected).

- Copy an item (only one item selected).
- Create/view/reply to queries (by clicking the Queries icon).
- View issues of items (by clicking the issues icon when available).

View Item

To view an item:

1. From the side menu, choose Items Management.
2. In the Items Management screen, select the item to view.

Download Items

To download items:

1. From the side menu, choose Items Management.
2. In the Items Management screen, select one or more items to download.
3. Click **Download**. A spreadsheet is downloaded containing the selected items data.

Copy Items

To copy items:

1. From the side menu, choose Items Management.
2. In the Items Management screen, select one item to copy.

3. Click **Copy Item**. A dialog box opens for the user to select which attributes are to be copied.

4. Select the attributes to be copied and click **Copy**.

> **Note:**
>
> The default attributes to be copied can be defined using a System Parameter setup. See the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide* for how to define them. Some options may not be available to all Item Types, and CFAs will not be available if they are not enabled.

5. In the Create or Edit Item screen, review and complete the item information.

6. Click **Submit**. If the user has approval permissions, the item is automatically moved to Approve status, otherwise it goes to New status, to be approved by a user with permissions.

Discontinue Items

If given permission, users are able to change the Item Location status to Discontinue for one or multiple selected items.

To discontinue items:

1. From the side menu, choose Items Management.

2. In the Items Management screen, select one or more items to discontinue.

3. Click **Discontinue**.
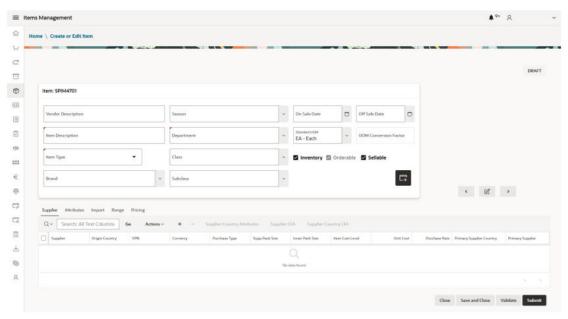
> **Note:**
>
> If the user is a Supplier, only the primary supplier can make this change. This action updates all locations status to Discontinued.

Create New Items Using the UI

If given permission, users are able to create new items using Supply Chain Hub.

To create new items:

- From the side menu, choose Items Management.

- In the Items Management screen, click **Create Item**.

- To create an item, multiple sections need to be populated. For Retailer users, the data can be entered in any order, however some fields have dependencies on other fields. Supplier users however will need to start by setting up the Supplier of the item.

Supplier Tab

To add suppliers for the item:

1. In the Supplier tab, click the + icon.

2. Add the Supplier information:

    - Supplier

    - Origin Country

        > **✎ Note:**
        >
        > A default Origin Country can be defined to simplify the creation. The default can be set at the Supplier level on the Profile Supplier Configuration page.

    - VPN - Vendor Product Number (optional).

    - Purchase Type - choose between available values:

        – Owned (default)

        – Consignment
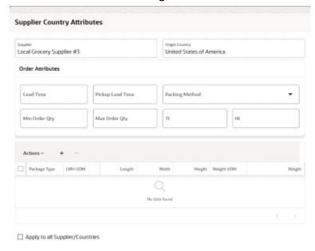
- – Concession
- Purchase Rate - disabled if purchase type is Owned.
- Inner Pack Size
- Supplier Pack Size
- Item Cost Level:
  - – Unit Cost
  - – Inner Cost
  - – Pack Cost
- Unit Cost

> **Note:**
>
> Unit Cost will hold the value set at the Item Cost Level during item creation. Once the item is created in MFCS, the value of Item Cost Level will always be Unit Cost.

- Primary Supplier - only one can be set per item.
- Primary Supplier Country - only one can be set per item/supplier.

3. In the Supplier tab, click **Supp Country Attributes**.

4. In the Supplier Country Attributes dialog box, set up additional Item/Supplier/Country attributes such as Ordering and Dimensions. All these fields are optional.

- Order Attributes (Lead Time, Pickup Lead Time, Packing Method, Supp Pack Size, Inner Pack Size, Min Order Qty, and Max Order Qty)
- Dimensions (LWH UOM, Weight UOM, Length, Width, Height, and Weight)
- Apply to all Supplier/Countries flag.

5. In the Supplier tab, click the Supplier CFA or Supplier Country CFA to open a dialog box to manage the MFCS Item Supplier CFAs and Item Supplier Country CFAs.

> **Note:**
>
> CFAs need to be set up in MFCS, configured and enabled using a System Parameter in Supply Chain Hub. For the necessary System Parameter configurations, see the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*. Also see the *Oracle Retail Merchandising Cloud Extensions Framework Implementation Guide* on My Oracle Support.

Item Header
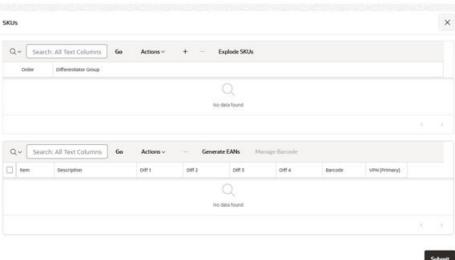
The following information needs to be entered for the header section:

1. Item - identifier of the item. This is automatically populated.

   - A new item will have a temporary SPIM ID number until it is interfaced with MFCS.

   - After being interfaced, the ID will be replaced by an ORIN provided by MFCS.

2. Vendor description

3. Item Description - populated automatically with the same description as the vendor description field.

4. Item Type - choose between the available values:

   - Style

   - SKU

   - Pack

5. Item Type Button - dependent on the Item Type, this button will have different behavior:

   a. Style - In the SKUs dialog box, select the differentiator group and differentiator values:

      i. Click **Explode SKUs** to generate all new combinations of the Differentiator Values and create SKU items.

      ii. Click **Generate EANs** to auto-generate the primary barcode for the SKU records without EAN.

      > **Note:**
      >
      > Generated EANs are always EAN13 generated by the Item Reservation Service of MFCS.

b. SKU - In the Manage Barcodes dialog box, click **Generate EAN**.

> ✏ **Note:**
>
> Generated EANs are always EAN13 generated by the Item Reservation
> Service of MFCS.
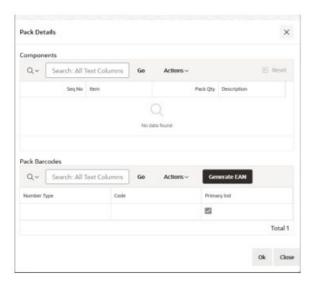
c. Pack - In the Pack Details dialog box, enter the pack components (item, quantity, and
    sequence number).

    Click **Generate EAN** to auto-generate the primary barcode for the SKU records
    without EAN.

> ✏ **Note:**
>
> Generated EANs are always EAN13 generated by the Item Reservation
> Service of MFCS.

6. Brand - select list of MFCS brands for the item (optional).

7. Season - select list of MFCS phases for the item (optional).

8. Department - select list of MFCS departments for the item.

9. Class - select list of MFCS classes for the item.

10. Subclass - select list of MFCS subclasses for the item.

11. On Sale Date - define the On Sale Date for the item (optional).

12. Off Sale Date - define the Off Sale Date for the item (optional).

13. Standard UOM - define the Standard UOM of the item.

14. UOM Conversion Factor - define the conversion factor if Standard UOM is different from EA - Each.

15. Inventory flag - Locked and default set to Yes.

16. Orderable flag - Locked and default set to Yes.

17. Sellable flag - Default set to Yes.
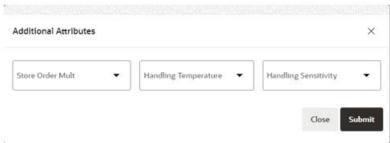
> **Note:**
>
> Department, Class, and Subclass cannot be changed after an item is Approved. Updates will have to be done using MFCS Item Reclassification. While in Draft or New, changing the Merchandise Hierarchy may cause the mandatory Buying and Selling Attributes to change.
>
> The Sellable flag can only be changed while the item is in Draft or New status. After Approval, this flag cannot be changed.
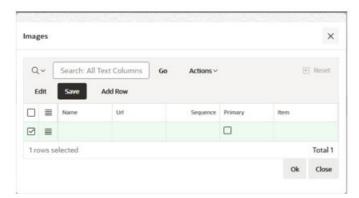
18. Additional attributes are available using the icon.
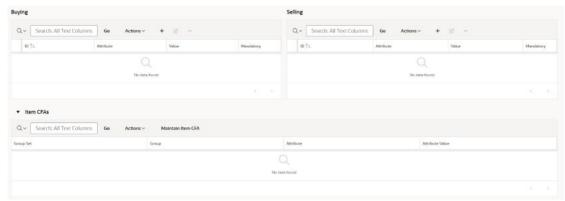
a. Store Order Mult - Select the list based on the MFCS Configuration for Store Order Mult (optional).

b. Handling Temperature - Select the list based on the MFCS Configuration for Handling Temperature (optional).

c. Handling Sensitivity - Select the list based on the MFCS Configuration for Handling Sensitivity (optional).

19. To add an image for the item, click **Edit Images**. In the Images dialog box, the following information must be entered:

a. Name - file name of the image.

b. URL - URL for the path to the image file (should not contain the image file name).

c. Sequence - indicates display sequence order of images associated to the item per priority.

d. Primary Indicator - indicates whether it is the primary image of the item.

Attributes Tab

In the Attributes tab, the user can add/update/remove Buying and Selling attributes, as well as Item CFAs:
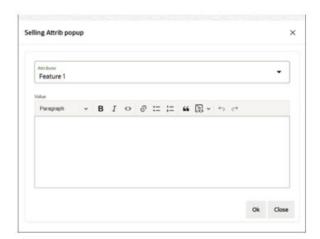
1. In the Buying Attributes section:

   a. If creating, click the + icon. If editing or removing, select an attribute first and then click the edit or – button to update or remove the attribute.

   b. If adding or editing, a dialog box is displayed to allow the user to update the value.

> **Note:**
>
> This table lists the UDAs associated with the item. For new items, the table automatically shows the mandatory and default attributes set up for the Merchandise Hierarchy of the item. Mandatory Attributes cannot be removed.

2. In the Selling Attributes section:

   a. If creating, click the + icon. If editing or removing, select an attribute first and then click the edit or – button to update or remove the attribute.

   b. If adding or editing, a dialog box is displayed to allow the user to update the value.

c.

> **Note:**
>
> This table lists the Selling Attributes associated with the item. For new items, the table automatically shows the mandatory and default attributes set up for the Merchandise Hierarchy / Supplier of the item. Mandatory Attributes cannot be removed.

3. In the Items CFAs section, if available, click **Maintain Item CFA** to open a dialog box to manage the MFCS Item CFAs.

> **Note:**
>
> CFAs need to be set up in MFCS, configured and enabled using a System Parameter in Supply Chain Hub. For the necessary System Parameter configurations, see the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*. Also see the *Oracle Retail Merchandising Cloud Extensions Framework Implementation Guide* on My Oracle Support.

Import Tab

To add import information:

- HTS - select the HTS code from a list of MFCS HTS.
- Import Country - select the Import Country from a list of MFCS.
- Origin Country - select the Origin Country from the list of Supplier Origin Countries (based on Countries on the Supplier Tab).
- Effect From - automatically populated with the effect from date of the HTS code setup.
- Effect To - automatically populated with the effect to date of the HTS code setup.
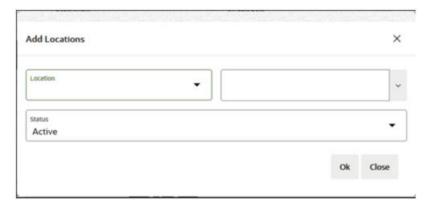
> **Note:**
>
> The HTS only can be defined if the Supplier tab was already filled in.

Range Tab

To add locations for the item that is ranged:

1. In the Range tab, click the **+** icon. (This tab is not available to Suppliers.)

2. In the Add Locations dialog box, enter the following information:

   a. Location Type - choose between the available values:

      - All Stores

      - Store

      - All Warehouses

      - Warehouse

      - Location List

   b. Location

   c. Status - choose between the available values:

      - Active

      - Discontinued

   - Location

   - Status - choose between the available values:

3. If CFAs are also maintained at the Item Location level, they are available by selecting one record and clicking the **Range CFA** button, if available.

> **Note:**
>
> CFAs need to be set up in MFCS, configured and enabled using a System Parameter in Supply Chain Hub. For the necessary System Parameter configurations, see the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*. Also see the *Oracle Retail Merchandising Cloud Extensions Framework Implementation Guide* on My Oracle Support.
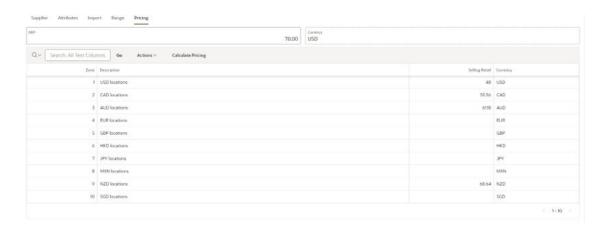
Pricing Tab

In the Pricing tab, the following pricing information can be viewed or edited:

ORACLE®

- RRP - Recommended retail price for the item. (Optional)

- Currency - System Currency (View only).

- Item Selling Retail by Zone - supplier roles will not have access to this section:

  – This table contains all the configured zones based on the Primary zone group of the Item Department in Oracle Retail Pricing Cloud Service (RPCS).

  – The initial selling retail can be calculated using the calculate button or can be manually inputted directly on the table for each zone.

  – By default, Calculate Pricing uses the markups defined in RPCS. If the Price Strategies application from the Price Hub is available, a different strategy may be configured to be used on Calculate Pricing.

  – Depending on which strategy was configured from Price Strategies, the following is required for Calculate Pricing:

    * For Area Diff and Price Points, a price must be populated for the reference zone before clicking Calculate Pricing, as it needs to know which reference zone is to be used for the calculation.

    * For Cost Plus, Primary Supplier Unit Cost is required.

  – Although by default it is not necessary to populate the prices for all zones, since MFCS will do the calculation if there is no data, the system may be configured to enforce that all zones have a price prior to approving an item.

> **Note:**
>
> For the details on the set up of Calculate Pricing, see the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*.

> **Note:**
>
> For the Calculate button to be used, the Unit Cost for the primary supplier is necessary if the item is Owned or in Consignment/Concession and using Cost per Unit. If the item is Consignment/Concession and using Purchase Rate calculation, RRP is necessary and in this scenario the price of each zone using the calculate will simply be a currency conversion of the RRP (if necessary).
>
> For Consignment/Concession items using Purchase Rate if a price is not defined, MFCS will default it to zero.

Actions

To complete creating the new items:

1. To check if all the item data is valid, click **Validate**.

2. To continue the process of item creation, click **Submit**. If the user has approval permissions, the item is automatically moved to Approve status; otherwise it goes to New status, to be approved by a user with permissions.

3. To save the current draft and close the screen, click **Save and Close**.

4. To discard any changes and close the screen, click **Close**.

Propose Changes to Items

When the item is in Approved status, the supplier can propose changes to the item:

1. From the side menu, choose Items Management.

2. In the Items Management screen, select the item which requires changes.

3. In the Create or Edit Item screen, click **Edit**.

4. Make the necessary updates. The following actions are supported:

   - Amend vendor and item description, dates, brand, and season.

     > **Note:**
     >
     > Supply Chain Hub does not support multiple seasons. If multiple seasons exist in MFCS, the seasons will be locked to be edited and Multiple will be displayed.

   - Add new SKUs to existing Style Items.

   - Add new Barcodes, or update primary barcode.

   - Add Supplier and Supplier Country attributes.

   - Update Supplier VPN and Supplier Country attributes.

   - Edit images.

   - Add Locations where the item is ranged.

   - Change status for the Item Location.

- Add Buying and/or Selling Attributes.

- Remove non-mandatory Buying and/or Selling Attributes.

- Change the value for the Buying and/or Selling attribute.

- Change the value for Item CFAs, Item Supplier CFAs, Item Supplier Country CFAs, and Item Location CFAs.

> **✎ Note:**
>
> CFAs need to be set up in MFCS, configured and enabled using a System Parameter in Supply Chain Hub. For the necessary System Parameter configurations, see the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*. Also see the *Oracle Retail Merchandising Cloud Extensions Framework Implementation Guide* on My Oracle Support.

5. After the changes are done, click **Submit**.

6. In the Reason dialog box, enter the Reason Code and Comments. Then click **Submit**.

7. If the user has approval permissions, the item automatically goes through the approval process to be sent to MFCS; if not, the Item status will change to Changes Proposed for the changes to be approved by a user.

Change Availability of Items

If given permission, users are able to change the Stock Available flag of the items selected.

To change the availability of items:

1. From the side menu, choose Items Management.

2. In the Items Management screen, select one or more items to change availability.

3. Click **Change Availability**.

> **✎ Note:**
>
> If the user is a supplier, only the primary supplier can make this change.

View Issues
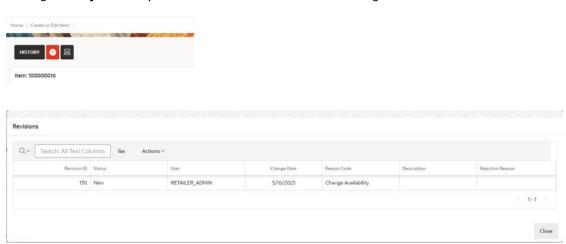
If there are issues during item submission due to missing fields or invalid data, the items where the errors were found will be listed and can be viewed by clicking the ⬛ icon on the Create or Edit Item screen or the 🔴 icon on the search screen table. A window is displayed with a list of issues that were found.

View History

The revision history of updates to an item performed in Supply Chain Hub can be viewed by clicking **History** in the top left corner of the Create and Edit Page.

Approve/Reject Items or Changes

A retailer user with Approval permissions can approve or reject the items or changes. If the item is in New or Changes Proposed status:

1. The user can review the item and decide to approve or reject it.

2. From the side menu, choose Items Management.

3. In the Items Management screen, select one or more items to approve or reject.

4. Click **Approve/Reject**.

    If Reject is selected, in the Reject Reason dialog box, complete the comments and then click **Submit**.

Similar Items

If a Supplier User or Retailer User without Approval Permissions submits a new item that matches the conditions defined to be a Similar Item, the newly created item will have a conflict that needs to be resolved before being approved. Out of the box, Items Management includes a rule for the case that the new Item uses the same barcode as an existing item. Additional Similar Item rules may be added using Custom created Views. Details on how to set them up can be found in the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide.*

A user with approve permissions is able to view the Similar Items dialog in two different ways:

- When opening the existing item.
- When opening the new item.

Regardless of when the dialog is opened, the user has two options:

- Approve the Item Merge. This action will:
  - Copy from the new item into the existing item:
    * Any Supplier/Country combination that does not exist on the existing item.
    * Any SKU and corresponding barcodes (from Diff combinations) that do not exist on the existing item.
  - Delete the new item.
- Close the dialog to address the issues manually.

> **Note:**
>
> This feature is disabled by default and needs to be enabled. See the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide* for information on how to enable it.

Upload Items

Alternatively, to using the front-end screens to create/update items, the users can choose to do the actions using the spreadsheet upload. This allows them to do multiple changes at the same time, in a single step.

> **Note:**
>
> CFAs need to be set up in MFCS, configured and enabled using a System Parameter in Supply Chain Hub. Additionally, the Upload/Download CFA tabs also need to be enabled if the CFAs are going to be used. For the necessary System Parameter configurations, see the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*. Also see the *Oracle Retail Merchandising Cloud Extensions Framework Implementation Guide* on My Oracle Support.

Changes to Existing Items

To make changes to existing items using a spreadsheet:

1. From the side menu, choose Items Management.
2. In the Items Management screen, select the item or multiple items that require changes.
3. Click **Download**.
4. Make the changes in the spreadsheet.
5. Click **Upload**. A dialog box is displayed on the Items Management screen or in the Upload and Download screen:
   a. Select the Upload tab.
   b. Choose Template Source > Items Management and Template Type > SPIM Item Data.

6. Choose the file.

7. Click **Upload**.

New Items using Upload

To create new items using a spreadsheet:

1. From the side menu, choose Upload and Download.

2. Select the Download Blank tab.

3. Choose Template Source > Items Management and Template Type > SPIM Item Data.

4. Click **Download**.

5. Create the item using the spreadsheet.

6. Upload the item using the Items Management screen or in the Upload and Download screen:

   a. Select the **Upload** tab.

   b. Choose Template Source > Items Management and Template Type > SPIM Item Data.

   c. Choose the file.

   d. Click **Upload**.

7

Cost Changes Management

The Cost Changes module allows retailers and suppliers to create cost changes. If given permissions, users are able to:

- View and download cost changes.
- Create new cost changes using the UI.
- Propose changes to cost changes.
- Approve or reject cost changes.
- Upload cost changes.
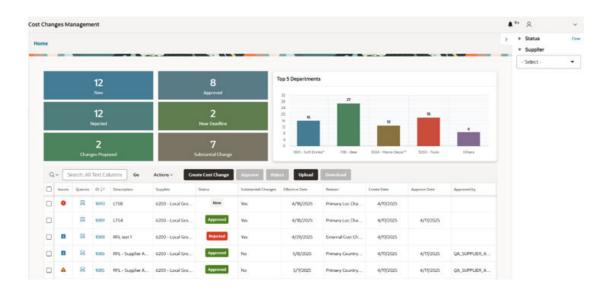
View and Download Cost Changes

The users are able to:

- Search for cost changes by using:
  - Right-side menu to filter the table by:
    * Status
    * Supplier
  - Directly on the table using the table headers
- View dashboards with a count of several cost change statuses to quickly identify potential status to check.
- Move between pages if more records are available than the configured records per page.
- Perform multiple actions to the cost changes:
  - View or edit a cost change (by clicking the ID).
  - Create a new cost change.
  - Upload cost changes.
  - Download (one or multiple cost changes selected).
  - Reject an item (one or multiple cost changes selected).
  - Approve an item (one or multiple cost changes selected).
  - Create/view/reply to queries (by clicking the Queries icon).
  - View issues of cost changes (by clicking the issues icon when available).

> **Note:**
>
> Additional Custom View Only fields can be added to display additional information. To enable this feature, a Custom View needs to be modified and the additional fields enabled. See the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide* for the views available. For details on how to enable the additional fields, see and the *Oracle Retail Merchandising Cloud Extensions Framework Implementation Guide* on My Oracle Support.

Custom Workflows
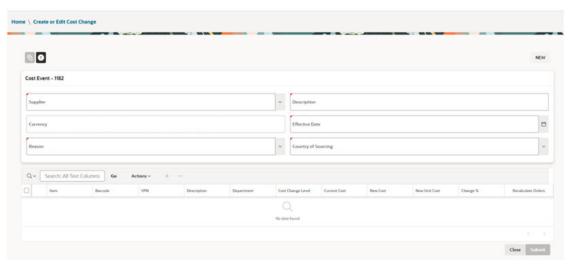
Cost Changes Management supports Custom Workflows. Cost Changes Management is delivered with a default defined in the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide* but can be customized by modifying the workflow configuration defined on the Dynamic Engine Framework. This guide describes the actions necessary to execute the tasks based on the default workflow.

For more details on how to modify the base workflow, see the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*. Also see the *Oracle Retail Merchandising Cloud Extensions Framework Implementation Guide* on My Oracle Support.

Create New Cost Changes Using the UI

If given permission, users are able to create new cost changes.
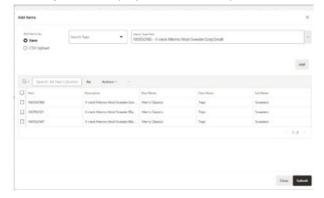
To create a new cost change:

1. From the side menu, choose Cost Changes Management.

2. In the Cost Changes Management screen, click **Create Cost Change**. The cost change is created in New status.

3. Select the Supplier and Country of Sourcing. The Currency is automatically populated based on the Supplier Currency.

> **Note:**
>
> A default Country of Sourcing can be defined to simplify the creation. The default can be set at the Supplier level on the Profile Supplier Configuration page.

4. Fill in the Description, Reason Code, and Effective Date:

   • Reason Codes are from the MFCS list of Cost Change reason codes.

   • The Effective Date minimum date is defined by the MFCS System Option (Cost Change Prior to Days).

5. Add items to the cost change:

   a. Click the + icon in the table.

   b. A dialog box is displayed where multiple items can be added to the cost change:

      i. Search for items to be added based on: Item Description, Style, SKU, VPN, or UPC/Barcode.

    ii. From a CSV file with three columns:

- Item ID (Style, SKU, VPN, or UPC/Barcode)

- New Cost

- Order Recalculation Indicator

    iii. From the table, it is possible to remove items before submitting into the cost change.

6. Once items are added, define the following:

- Cost Change Level (Unit Cost, Inner Cost, Case Cost)

- New Cost (based on the Cost Change Level)

> **Note:**
>
> The change % and New Unit Cost are automatically calculated.

- Recalculate Orders Indicator, if the user chooses to recalculate Orders based on the New Cost once it becomes effective.

> **Note:**
>
> Additional Custom View Only fields can be added to display additional information. To enable this feature, a Custom View needs to be modified and the additional fields enabled. See the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide* for the views available. For details on how to enable the additional fields, see and the *Oracle Retail Merchandising Cloud Extensions Framework Implementation Guide* on My Oracle Support.

7. Once all mandatory fields and needed items have been entered, the cost change can be submitted. Depending on the user type and permissions, the cost change will remain in New status or will be automatically approved:

- For users without the approval role, cost changes are always created in New status. Users with the approval role can then approve the cost changes.

- If the user has the approval role and is a Supplier, and if no item has exceeded the defined Supplier-level tolerance percentage, the cost change will be automatically approved; if not, it will be kept in New status to be approved.

- If the user has the approval role and is a Retailer, the cost change is automatically approved.

> **Note:**
>
> The approval behavior is based on the default workflow of Cost Changes Management. Since the workflow can be changed in Cost Changes Management, this behavior may not be applicable.
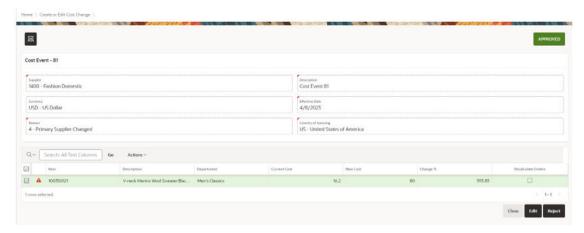
Propose Changes to Cost Changes

When a cost change is Approved and has not been extracted to MFCS (Status Extracted), a supplier or retailer can make changes to it:

1. From the side menu, choose Cost Changes Management.

2. In the Cost Changes Management screen, select the Cost Change which requires changes.

3. In the Create or Edit Cost Change screen, click **Edit**.

4. Perform the necessary updates. The following actions are supported:

   • Amend the effective date, description, and reason code.

   • Add or remove items.

   • Update the Cost or Recalculate Order flag.

5. Click **Submit**. Depending on the user permissions, the cost change status can remain Approved or change to Changes Proposed status to then be approved.

Approve/Reject Cost Changes

If a Cost Change is in New or Changes Proposed status, a user can review the Cost Changes and decide to Approve/Reject it. A user with Approval permissions can:

1. From the side menu, choose Cost Changes Management.

2. In the Cost Changes Management screen, select one or more Cost Changes to Approve/Reject.

3. Click **Approve/Reject**.

Alternatively, the same actions can be done on the Create and Edit Cost Change Screen while viewing a Cost Change.

> ✏️ **Note:**
>
> An Approved Cost Change can be canceled by rejecting the approved Cost Change. A Rejected Cost Change can be updated and submitted again.

Upload Cost Changes

Alternatively, to using the screens to create/update cost changes, the users can choose to do the actions using Spreadsheet upload. This allows them to do multiple changes at the same time, in a single step.

Changes to Existing Cost Changes

To make changes to a cost change:

1. From the side menu, choose Cost Changes Management.

2. In the Cost Changes Management screen, select the item or multiple cost changes that require changes.

3. Click **Download**.

4. Make the changes in the spreadsheet.

5. Click **Upload**. A dialog box is displayed on the Cost Changes Management screen or in the Upload and Download screen:

   a. Select the Upload tab.

   b. Choose Template Source > Cost Change Management and Template Type > SPCC Cost Change.

6. Choose the file.

7. Click **Upload**.

New Cost Changes Using Upload

To upload cost changes using a spreadsheet:

1. From the side menu, choose Upload and Download.

2. Select the Download Blank tab.

3. Choose Template Source > Cost Change Management and Template Type > SPCC Cost Change.

4. Click **Download**.

5. Create the cost change using the spreadsheet.

6. Upload the cost change using the Cost Changes Management screen or the Upload and Download screen:

   a. Select Upload tab.

   b. Choose Template Source > Cost Change Management and Template Type > SPCC Cost Change.

   c. Choose the file.

   d. Click **Upload**.

8
Supplier Performance

Supplier Performance is an application designed to monitor the relationship performance of a supplier by monitoring major KPIs automatically and recording questionnaires for non-automatic KPIs.

There are six key metrics that are maintained by Supplier Performance:

- On Time Delivery metric compares the Estimated Arrival date of a PO shipment versus the first receipt date of the shipment.

- Quantity Compliance metric compares the expected shipment quantity versus the quantity received at a warehouse.

- Invoice Compliance metric keeps the ration of merchandise invoices with discrepancies versus without.

- Return % metric keeps track of the percentage of stock that was returned through an RTV versus the overall stock received.

- Defect % metric keeps track of the percentage of stock adjusted due to defects versus the overall stock received.

- Overall Compliance metric is the average of all the metrics.

> **Note:**
>
> All metrics thresholds, data windows to be used for the calculations, waiting windows for receipts, return reason codes, and inventory adjustment reason codes can be configured. For details on how to set these up during implementation, see the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*. Supplier Performance will only start collecting data from the moment a Supplier is configured within Supply Chain Hub for Supplier Performance.

The application is designed for retailers only and provides:
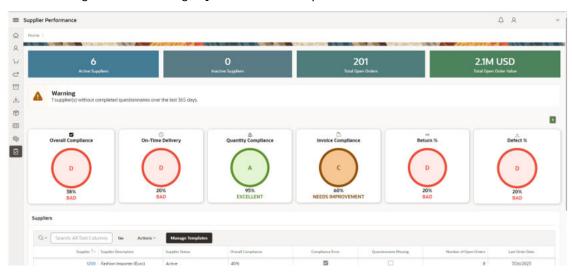
- Monitor overall supplier performance.

- View supplier performance details.

- View questionnaire replies.

- Complete questionnaires.

- Maintain questionnaire templates.

- Upload questionnaires and questionnaire templates.

Monitor Overall Supplier Performance

Users are able to:

- View Dashboards with System Metrics:

  – Number of Active and Inactive Suppliers being monitored by Supplier Performance

- – Number of Open Orders

- – Total Open Order Value

- • View Supplier Performance Warnings:

  - – Display a warning if there are Suppliers pending Questionnaires

- • View Overall Supplier Performance Key Metrics:

  - – Overall Compliance

  - – On Time Delivery

  - – Quantity Compliance

  - – Invoice Compliance

  - – Return %

  - – Defect %

- • Supplier List:

  - – View the Overall Status of a Supplier

  - – Navigate to the Supplier Performance Details

  - – Navigate to the Manage Questionnaire Templates screen
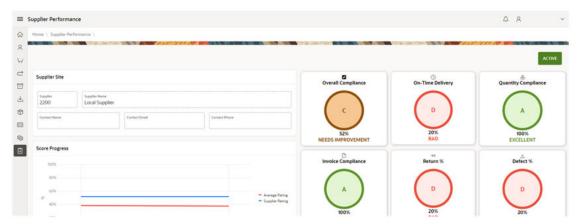
View Supplier Performance Details

From the Homepage of Supplier Performance with the Overall Supplier Performance, click a Supplier in the Supplier List to navigate to the Supplier Performance screen. From this screen, the user can:

- • View Supplier Details

- • View Breakdown of latest Supplier KPIs

- • View Supplier Score Progress versus Overall Supplier Score Progress

- • View Supplier Purchase Order Status

- • View the Questionnaire Reply List. The following actions are available on the table:

  - – Upload Replies to Questionnaires

  - – Download Questionnaire Blank Reply
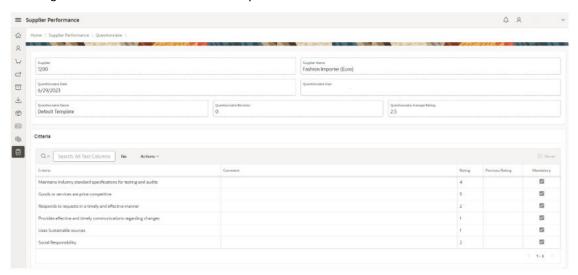
– Complete Questionnaire

View Questionnaire Replies

If given permission, users are able to view Questionnaire Replies:

1. From the side menu, choose Supplier Performance.

2. In the Supplier Performance Dashboard screen, click **Supplier**.

3. In the Questionnaire table, click the ID of one Questionnaire to open the Questionnaire Page with the details of the chosen questionnaire.
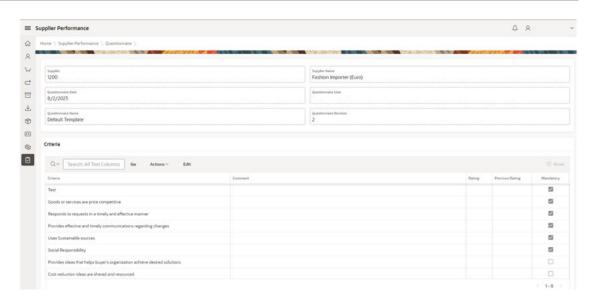
Complete Questionnaires

If give permission, users are able to complete questionnaires:

1. From the side menu, choose Supplier Performance.

2. In the Supplier Performance Dashboard screen, click the Supplier.

3. In the Questionnaire table, click **Complete Questionnaire**.

4. On the Questionnaire screen, complete all the mandatory criteria and add comments when necessary.

5. Click **Submit** to complete the Questionnaire.
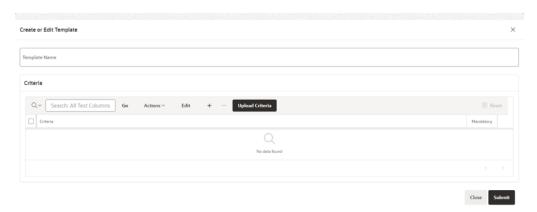
Maintain Questionnaire Templates

If given permission, users are able to maintain questionnaires:

1. From the side menu, choose Supplier Performance.

2. In the Supplier Performance Dashboard screen, click **Manage Templates** in the Suppliers table.

3. The Questionnaire Template Screen opens. The user can add, edit, and delete templates:

   • To add a new template, click the + icon to open a dialog box:

      a. Provide a description.

      b. Add criteria (Criteria can also be uploaded using a CSV upload with one criteria per line).

      c. Click **Submit** to finish creating the Questionnaire Template.

   • To edit an existing template, click the edit template icon to open a dialog box and to edit the template:

      a. Edit the description, if necessary.

      b. Add/edit/remove Criteria.

      c. Click **Submit** to complete the update. A new revision of the template is created. Any new replies will use the new template.

- To remove an existing template, select the templates to remove and click the – icon to remove the selected templates. It is only possible to remove templates if they are no longer in use by any supplier

> **Note:**
>
> To associate a template to a Supplier, a Retailer Admin needs to assign the template ID to the supplier under the Supplier Configurations on the Profile Application.

Upload Questionnaires and Questionnaire Templates

Alternatively, to using the screens to maintain or reply to questionnaires, the user can choose to perform these actions using the Spreadsheet upload. This allows the user to perform multiple changes at the same time, or do them without navigating to the Supplier screen.

Create New Questionnaire Template

To create a new questionnaire template.

1. From the side menu, choose Upload and Download.

2. Select the Download Blank tab.

3. Choose Template Source > Supplier Performance and Template Type > SPPF – Questionnaire.

4. Click **Download**.

5. Create the new questionnaire template on the spreadsheet.

6. Click **Upload** to open a dialog box on the Questionnaire Template screen or in the Upload and Download screen:

   a. Select the Upload tab.

   b. Choose Template Source > Supplier Performance and Template Type > SPPF - Questionnaire.

7. Choose a file.

8. Click **Upload**.

Maintain Existing Questionnaire Template

To maintain existing templates:

1. From the side menu, choose Supplier Performance.

2. In the Supplier Performance Dashboard screen, click **Manage Templates** in the Suppliers table.

3. Select a template.

4. Click **Download**.

5. Make the changes in the spreadsheet.

6. Click **Upload** to open a dialog box in the Questionnaire Template screen or in the Upload and Download screen:

   a. Select the Upload tab.

   b. Choose Template Source > Supplier Performance and Template Type > SPPF - Questionnaire.

7. Choose a file.

8. Click **Upload**.

Reply to Questionnaire

To reply to a questionnaire:

1. From the side menu, choose Supplier Performance.

2. In the Supplier Performance Dashboard screen, do one of the following:

   • Click Manage Templates in the Suppliers table. Select the template to download and Download the Questionnaire to be replied.

   • Click the Supplier to enter the Supplier Performance screen. In the Questionnaires table, click **Download Blank**.

3. Reply to the questionnaire on the spreadsheet.

4. Click **Upload** to open a dialog box in the Supplier Performance screen or in the Upload and Download screen:

   a. Select the Upload tab.

   b. Choose Template Source > Supplier Performance and Template Type > SPPF - Questionnaire Reply.

5. Choose a file.

6. Click **Upload**.

9
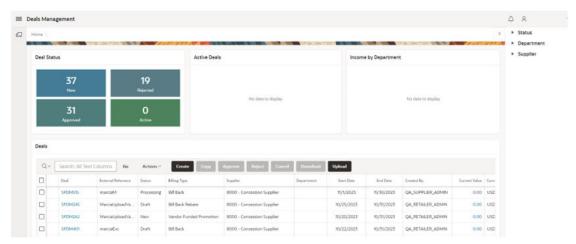
Deals Management

The Deals Management module facilitates the collaboration between retailers and suppliers on the creation and maintenance of new deals. Depending on user permission, each user is able to:

- View and download deals.
- Create new deals using the UI.
- Create promotions (for vendor-funded promotions).
- Approve, reject, and cancel deals.
- Upload new deals or update existing non-approved deals.
- View deal performance.

View and Download Deals

Within the dashboard screen, users can:

- View Dashboards with key information:
  - Status
  - Active Deals
  - Income
- View the list of deals.
- Apply filters directly in the results table or using the Facet Search menu.
- Order results directly in the table.
- Perform multiple actions to the deals:
  - View or edit a deal (by clicking the ID).
  - Create a new deal.
  - Upload a deal.

- – Download (one or multiple deals selected).

- – Reject a deal (one or multiple deals selected).

- – Approve a deal (one or multiple deals selected).

- – Cancel a deal (one or multiple deal selected).

- – Copy a deal (only one deal selected).

- • View the current value and performance (by clicking the Value).

- • Create/view/reply to queries (by clicking the Queries icon).

- • View issues of deals (by clicking the issues icon when available).
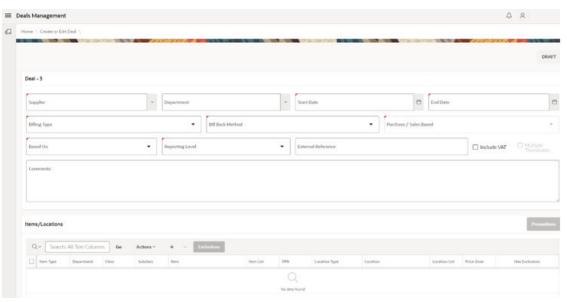
Download Deals

To download data for deals:

1. From the side menu, choose Deals Management.

2. In the Deals Management screen, select one or more deals to download.

3. Click **Download**. A spreadsheet is downloaded containing the selected deals data.

Create Deals Using the UI

If given permission, users are able to create new deals.

To create a new deal:

1. From the side menu, choose Deals Management.

2. In the Deals Management screen, click **Create Deal**. The deal is created in Draft status. Multiple sections need to be populated.

Deal Header

To set up the deal header:

1. The Deal has a Deal ID. The Deal ID is the identifier of the deal. It is created automatically.

- A new deal will have a temporary SPDM ID number until it is interfaced with MFCS.

- After being interfaced, the ID will be replaced by an ID provided by MFCS.

2. In the Header Deals screen, enter the following information:

   a. Supplier Parent (mandatory)

   b. Department (not mandatory)

   c. Start Date (mandatory)

   d. End Date (mandatory)

   e. Billing Type (mandatory) - choose between the available values:

      - Bill-Back (BB)

      - Bill-Back rebate (BBR)

      - Vendor Funded Promotion (VFP)

   f. Bill Back Method (mandatory) - populated automatically based on the default value set at the supplier level. However, users can choose between the available values:

      - Credit Note

      - Debit Note

   g. Based On (mandatory for BB/BBR) - choose between the available values:

      - Quantity - number of units

      - Amount - total value of units

   h. Reporting Level (mandatory) - populated automatically with the default value set at the supplier level. However, users can choose between the available values:

      - Week

      - Month

      - Quarter

   i. Purchase / Sales Based (mandatory for BBR) - choose between available values:

      - Purchase / Sales Based (mandatory for BBR) - choose between available values:

         – Sales

         – Purchase

      > **Note:**
      >
      > If the Deal is a BBR deal, the user is required to choose between Purchase or Sales. If it is a BB deal, this field is pre-selected with the Purchase option and does not allow it to be changed. If it is a VFP deal, this field is pre-selected with Sales option and no changes are allowed.

   j. External Reference (not mandatory)

      > **Note:**
      >
      > After the deal is approved, this field will store the original deal ID from Deals Management.

  k. Include VAT flag (not mandatory) - Default set to Yes.

  l. Multiple Threshold flag (not mandatory) - Default set to No.

> ✏️ **Note:**
>
> The flag is disabled when the deal is a Vendor Funded Promotion. If multiple thresholds are selected, the Default Contribution Value fields and Contribution Type and Value in the Items/locations section are disabled.
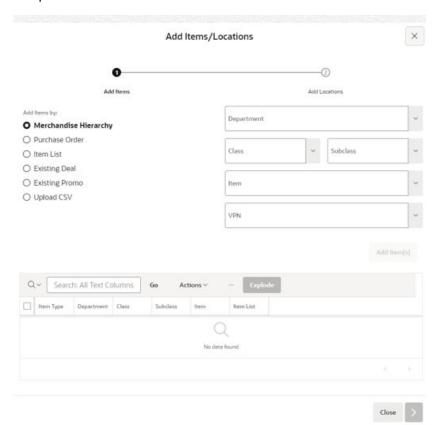
  m. Comments (not mandatory)

Items/Locations Detail

In the items/location section, to add or remove item/location combinations:

- To add Item/location combinations, click the + icon to add items and locations for the deal.
- To remove a combination, select the record to be deleted and click the – icon to remove the items/location.

When adding a new Item/Location combination, a dialog box is displayed. The user can add multiple items and locations to a deal.

1. Select the items:

  a. Choose between the available options and add items by:

   - Merchandise Hierarchy - select the list of MFCS departments, classes, subclasses, items, or VPN for the deal.
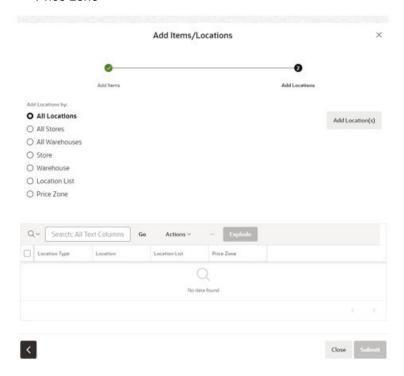
- Purchase Order - select the list of MFCS purchase orders for the deal.
- Item List - select the list of MFCS items list for the deal.
- Existing Deal - select the list of MFCS deals for the deal.
- Existing Promo - select the list of MFCS promos for the deal.
- Upload CSV - select the file containing a list of items.

b. Click **Add Items(s)** to add the selected items to the table with the list of items to be added to the deal.

If required, it is possible to remove items before submitting directly on the table into the deal.

> ✎ **Note:**
>
> Items and Locations cannot be changed after deals are approved. Purchase order, existing deal, and existing promo explode into the items.

2. Once all Items have been selected, click the **>** icon to move to Add Locations.

3. In the Add Locations section of the dialog box, choose between the available options and add locations by:

- All Locations
- All Stores
- All Warehouses
- Store
- Warehouse
- Location List
- Price zone

4. Click **Submit** to add the selected list of items and locations to the deal.

> ✏ **Note:**
>
> The Explode button is available on both Items and Locations and allows the user to explode the Merchandise Hierarchy at the item level and All locations, all stores, all warehouse at the location level. Additionally, for Vendor Funded Promotion, it is not possible to add Warehouses, so any warehouses within a Location List will be ignored.

Items/Locations Exclusions

In addition to including Item/Locations in the deal, it is also possible to exclude Item/Locations from the deal similar to MFCS.
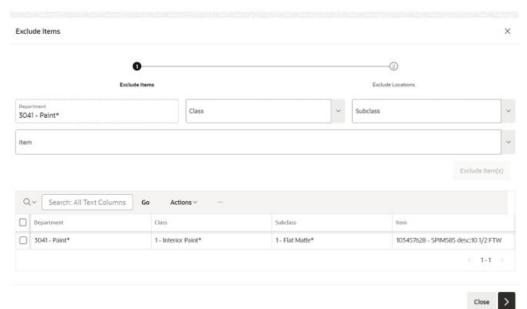
To maintain exclusions to a selected Item/Location combination, select the Item/Location record and click **Exclusions**. A dialog box is displayed to add or remove exclusions:

- To add exclusions, click the + icon to add the items and locations. The Exclude Items dialog box is displayed.

- To remove a combination, select the record to be deleted and click the – icon to remove the exclusion.

To add an exclusion:
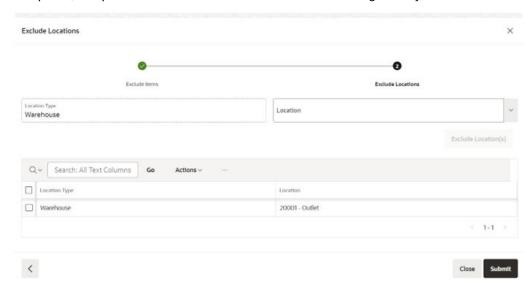
1. Choose the items to exclude:

   a. Enter the information for the class, subclass, and/or item to exclude.

   b. Click **Exclude Item(s)** to add the item to the list.

   If required, it is possible to remove items before submitting directly on the table.
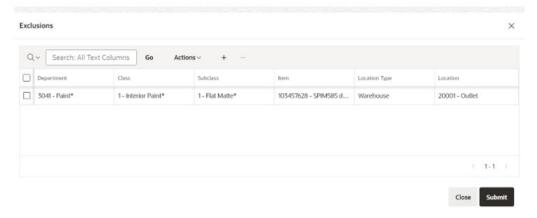
   c. Click the **>** icon, to add the locations to exclude.

2. Enter the information for the location type and location to exclude:

   a. Click **Exclude Location(s)** to add the location to the list.

If required, it is possible to remove locations before submitting directly on the table.

b. Click **Submit** to add the exclusions to the Exclusions.

c. Once all the exclusions have been added/removed, click **Submit** to finish.

> **Note:**
>
> When adding an exclusion at item/location level, the Has Exclusion indicator changes on the Item/Locations List to indicate that there are exclusions associated to the item/location.

Deal Specific Configuration

Bill Back and Bill Back Rebate Deal

When the Billing Type is Bill Back or Bill Back Rebate, the user must define if multiple thresholds will be used or not, by enabling or disabling the Multiple Threshold flag at the header level.
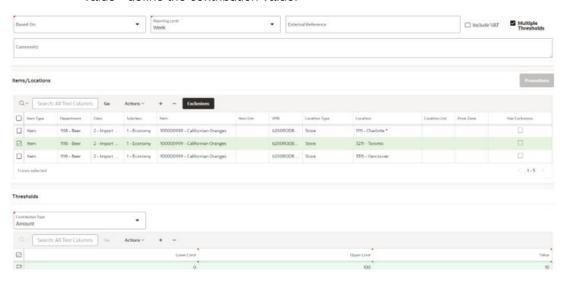
*   If the multiple threshold checkbox is unchecked, the following fields need to be defined:

    –   The Default Contribution Type and Value (to be used as the default as new item/locations are added).

    – The Contribution Type and Contribution Value at the Item/Location level.

> **✎ Note:**
>
> Having different values of Contribution Type/Value at the Item Location level will create multiple deal details for the same deal in MFCS.

- If the multiple thresholds flag is checked, a Threshold section is displayed and the user is required to define:
  - The Contribution Type:
    - * Amount
    - * Percent
  - The multiple thresholds using the +/- buttons to add entries to the table.
    - * Lower Limit - define the value in amount or quantity in accordance with Based On.
    - * Upper Limit - define the value in amount or quantity in accordance with Based On.
    - * Value - define the contribution value.
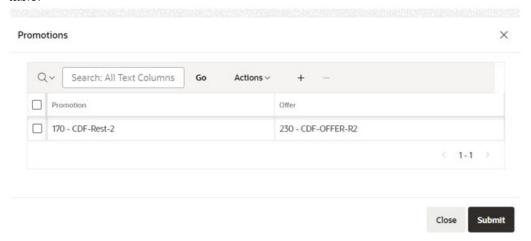
Vendor Funded Promotion

When the Billing Type is Vendor Funded Promotion, based on the System Parameters and/or Supplier Configuration, the user must define if Promotions are to be created or associated (only one type of action is possible):
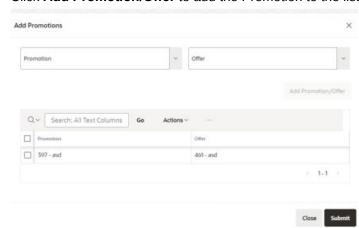
- If the Promotions are to be created, the following needs to be defined:
  - The Default Discount Type and Value (to be used as the default as item/locations are added to the deal).
  - The Default Contribution Type and Value (to be used as the default as new item/ locations are added).
  - The Discount Type and Value at the item/location level (if different from the default).
  - The Contribution Type and Contribution Value at the item/location level.

- If promotions are not to be created, the user can select the promotions and offers to be associated. In addition, and similar to the Create Promotion scenario, the Contribution Type/Value needs to be defined as well:

  1. To associate a promotion, click **Promotions**.

  2. In the Promotions dialog box, add/remove promotions using the +/- buttons on the table.

  3. When adding by clicking the + icon, the Add Promotions dialog box is displayed.

  4. Use the dropdowns to select a Promotion and Offer from Oracle Retail Pricing Cloud Service (RPCS):

     – Promotion - select the Promotion from a list from RPCS.

     – Offer - select the Promotion from a list from RPCS.

  5. Click **Add Promotion/Offer** to add the Promotion to the list.

  6. Click **Submit** to add the Promotions and close the dialog box.

  7. Once all Promotions have been associated, click **Submit** button to close the window and return to the main window.

Propose Changes to a Deal

It is possible to edit a deal while the deal has not started being processed into MFCS:

1. From the side menu, choose Deals Management.

2. In the Deals Management, select the deal that requires changes.

3. In the Create or Edit Deal screen, click **Edit**.

4. Make the changes required to the Deal.

5. After the changes are done, click **Submit**.

6. In the Reason dialog box, complete the Reason Code, Due Date, and Comments. Click **Submit**.

Copy Deals

Deals can be copied as long as they were created in Deals Management:

1. From the side menu, choose Deals Management.

2. In the Deals Management screen, select one deal to copy.

3. Click **Copy**.

4. In the Create or Edit Deal screen, review and complete the necessary details.

5. Click **Submit**. The deal is moved to New status, to be approved by a user with the required permission.

Cancel Deals

Deals can be canceled while they have not been sent to MFCS:

- From the side menu, choose Deals Management.

- In the Deals Management screen, select one or more deals to cancel.

- Click **Cancel**. The deal is moved to Cancel status.

> **Note:**
>
> Deals can only be canceled while in Awaiting Processing status.

Approve/Reject Deals or Changes

To perform approval of a new deal, to make changes to a deal, or reject deals, a user with Approval permissions is required. These actions can be performed on the Deals Management Dashboard page or from the Create or Edit Deal Screen:

1. If a Deal is in New or Awaiting Approval status, a user can review the deals and decide to Approve/Reject it.

2. From the side menu, choose Deals Management.

3. In the Deals Management screen, select one or more deals to Approve/Reject.

4. Click **Approve/Reject**.

5. If rejecting, the Reject Reason dialog box is displayed. Select a reason and/or add comments.

> **Note:**
>
> A Rejected Deal by the supplier or retailer can be updated and submitted again.

View Issues

If there are issues during deal submission due to validation or errors, the errors found will be listed and can be viewed by clicking the ⊕ icon on the Create or Edit Item screen or the ⚠ icon on the search screen table. A window is displayed with a list of issues that were found.
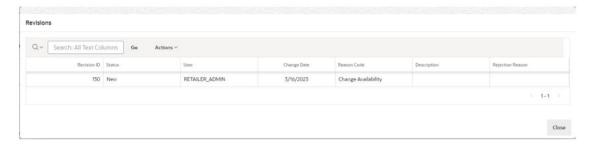
> **Note:**
>
> Deals Management uses Custom Validations. New validations can be added. For a list of all the validations being performed, see the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*. For information on how to set up new validations, see the *Oracle Retail Merchandising Cloud Extensions Framework Implementation Guide* on My Oracle Support.

View History

The history of updates to an deal performed in Deals Management can be viewed by clicking **History** in the top left corner of the Create and Edit Page.

This page shows an audit of all actions, when they were performed and by whom, and includes details of status changes and comments to updates.

View Performance

If given permission, users can view the accumulated value of a deal to date:

1. From the side menu, choose Deals Management.
2. Click the deal's Current Value. The Deal Performance screen opens. The following information can be viewed:

   - Current Threshold Graph - If BB/BBR deal.

   - Accumulated Value Graph - only available for Retailer Users

   - Deals details:
     – Deal ID
     – Deal Type
     – Start date and End date
     – Current Threshold - If BB/BBR deal
     – Current Threshold Value - If BB/BBR deal
     – Current Value
     – Next Threshold - If BB/BBR deal
     – Next Threshold Value - If BB/BBR deal
     – Accumulated Value

   - Purchase Order Table - If BB/BBR deal purchase based:
     – Order Number
     – Accumulated Value
     – Total Value
     – Received Quantity
     – Exp. Delivery Date
     – Actual Delivery Date

   - Promotion Table - If VFP deal:
     – Promo no.
     – Offer ID
     – Start date and End date
     – Total Sales
     – Total Value
     – Accumulated Value

   - Sales Table - If BBR Deal sales based:
     – Reporting Period
     – Total Sales
     – Total Value
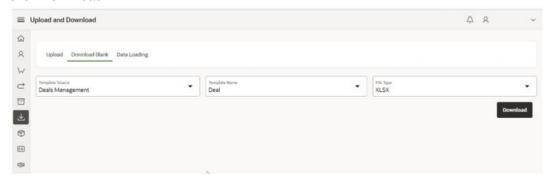
Create and Update Deals Using Upload

Alternatively, to using the screens to create and update deals, the users can choose to do the actions using the Spreadsheet upload. This allows them to do multiple changes at the same time, in a single step.

New Deal Using Upload

To create a new deal by uploading a spreadsheet:

1. From the side menu, choose Upload and Download.

2. Select the Download Blank tab.

3. Choose Template Source > Deals Management > Deal.

4. Click **Download**.
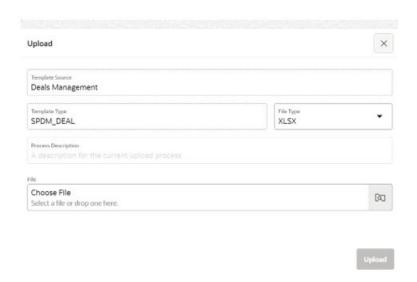
5. Populate the Deal Details in the downloaded spreadsheet.

6. Upload the Deal using the Deals Management screen or in the Upload and Download screen:

   a. Select the Upload tab.

   b. Choose Template Source > Deals Management > Deal.

   c. Choose the file.

   d. Click **Upload**.

Change Existing Deals Using Upload

To make changes to existing deals by uploading a spreadsheet:

1. From the side menu, choose Deals Management.

2. Select the deals that require changes.

3. Click **Download**.

4. Make the changes in the spreadsheet.

5. Click **Upload**.

6. In the Upload dialog box, select the file with the changes.

7. Click **Upload**.

> **Note:**
>
> Only deals in New or Changes Proposed status can be edited.

10
Quality Control

The Quality Control (QC) module allows users to create and execute QC jobs related to items available at the job locations or to job associated entities. Users are able to go through a checklist and confirm that those tasks have been completed successfully, or if issues were found.

If given permission, users are able to:

- Create jobs manually.
- View and execute jobs.
- Download existing jobs.
- Upload new jobs or execute existing ones.
- Define, update, or view rules to automate job creation.
- Define, update, or view templates to be used in the job creation process.
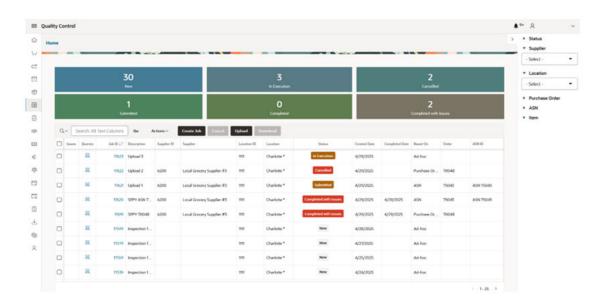
View Jobs

The main entry page of Quality Control displays several dashboards, a table with a list of jobs, and a filter on the right-hand side. From this screen, users are able to:

- Filter jobs in the right-side menu.
- Apply filters directly in the table.
- Analyze jobs that need attention.
- Download and upload jobs.
- Create/view/reply to queries (by clicking the Queries icon).
- View issues of jobs (by clicking the issues icon when available).

> **Note:**
>
> Additional Custom View Only fields can be added to display additional information. To enable this feature, a Custom View needs to be modified and the additional fields enabled. See the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide* for the views available. For details on how to enable the additional fields, see and the *Oracle Retail Merchandising Cloud Extensions Framework Implementation Guide* on My Oracle Support.

Filter Jobs in the Right-Side Menu

To view and search for jobs:

1. From the side menu, select Quality Control. The dashboard screen is displayed.

   > **Note:**
   >
   > The right-side menu is visible by default.

2. In the filter by Status and/or Location and/or Supplier, the filter availability depends on the user's permission:

   - Status:

     – If the user is a Retailer User, the user can filter on status: New, In Execution, Canceled, Submitted, Completed, and Completed with issues.

     – If the user is a Supplier User, the user can filter on status: Completed, and Completed with issue

       > **Note:**
       >
       > If the user is a supplier, the data displayed in the table will only be related to jobs for suppliers for which the user has permission.

   - Supplier:

     – Dropdown list of Suppliers

   - Location:

     – Dropdown list of Locations

> **Note:**
>
> The list available for location or supplier depends on the user permission set up in the user profile.
>
> The filter only applies to the jobs in the table; the values in the dashboard are not affected.

- Purchase Order
- ASN
- Item

> **Note:**
>
> For Purchase Order, ASN, and Item Filtering. multiple values can be entered. By default, Space is the delimiter of IDs, however it can be modified using a System Parameter. For details, see the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide.*

Apply Filters in the Jobs Interactive Table

Alternatively, it is possible to filter the jobs directly on the Interactive Grid.

Filter directly in the table columns:

- Issues
- Queries
- Job ID
- Description
- Supplier ID/Name
- Location ID/Name
- Status
- Created Date
- Completed Date
- Based On
- Order
- ASN ID

> **Note:**
>
> This filter only applies to the jobs in the table.

Analyze Jobs that May Need Attention

At the top of the page, there are dashboards that display some counts on the overall status of the jobs. The number of dashboards depends on the user type:

- If the user is a Retailer user:
  - New

    Count of jobs with New status
  - In Execution

    Count of jobs with In Execution status
  - Canceled

    Count of jobs with Canceled status
  - Submitted

    Count of jobs with Submitted status
  - Completed

    Count of jobs with Completed status
  - Completed with Issues

    Count of jobs with Completed with Issues status
- If the user is a Supplier user:
  - Completed

    Count of jobs with Completed status
  - Completed with Issues

    Count of jobs with Completed with Issues status

> **Note:**
>
> The count depends on the user permission and data level security set up in the user profile.
>
> The Based-on Ad-Hoc is visible to the supplier if the supplier is defined in the job header.

Download Jobs

If given permission, users are able to download jobs directly from the Interactive Grid:

1. From the side menu, select Quality Control.

2. The user can select one or more jobs in the table list.

3. Click **Download** and the selected jobs are downloaded.

Upload Jobs

Upload of jobs is also available on the dashboard screen. If given permission, users are able to upload jobs. For details on the process and available actions, see Create Jobs and Execute Jobs.

Create Jobs
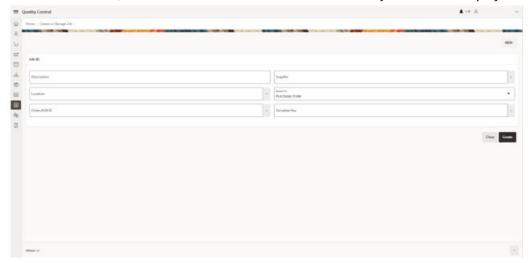
Jobs can be created manually or automatically during Rules Execution:

- Jobs can be created manually based on:
    - PO
    - ASN
    - Ad-Hoc

- The automated creation of jobs depends on the defined rules in the Manage Rules Configuration screen.

Create Jobs Manually

If given permission, users are able to manually create a job:

1. From the side menu, select Quality Control. The dashboard screen is displayed.

2. In the table header, click **Create Job**. The Create and Maintain job screen is displayed.

> **Note:**
>
> Only users with the Create Job permission are able to create new jobs using the screen or spreadsheet upload.

3. The user can populate the following header fields:

- Description (Mandatory)
- Supplier:
    - Drop down list to select one of the suppliers available for that user.

–   Only editable if there are no items added to the items grid.

> **Note:**
>
> Each job can have only one supplier added (maximum).
>
> The supplier is mandatory if the Based On is PO or ASN. Ad hoc Items from multiple suppliers may be included so it is not mandatory.

- Location (Mandatory)

  Drop down list to select one of the available locations (Warehouses or Stores)

- Based On (Mandatory)

  Drop down list to select one of the available options:

  – Purchase Order

  – ASN

  – Ad-Hoc

> **Note:**
>
> If the Based On is Purchase Order or ASN, the filed supplier is mandatory.

- Order/ASN ID

  Drop down list to select the ASN ID or Purchase Order ID:

  – If Based On is Purchase Order or ASN, this field is mandatory.

  – If Based On is Ad-Hoc, the field will not be editable.

> **Note:**
>
> The values available are filtered based on the location and supplier added.
>
> If Based On is PO, the purchase orders suggested cannot be in the worksheet, submitted, or with all items canceled.
>
> If the PO selected has more than one location, the items added are only the items from the location selected in the header.

- Template

  – Drop down list.

  – The values suggested depend on the Based On value selected.

  – This is a non-mandatory field.
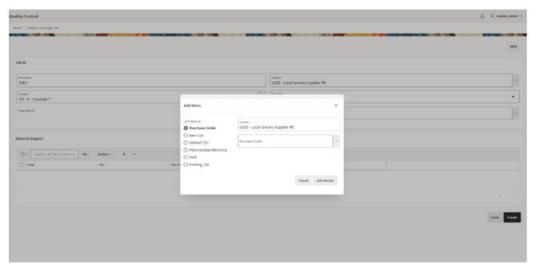
> **Note:**
>
> If not selected, the job is created without checks at the job header (Overall Checks).
>
> If the Based On selected is Ad-Hoc, the checks are applied to the header (Overall Checks), but to the selected items.

4. For Ad-hoc jobs only, an additional table is available to add items to the job. Clicking the + or - icon will maintain the items to be included on the job.

The user can add items based on different criteria:

- Purchase Order
- Item List
- Upload CSV
- Merchandise Hierarchy
- Deal
- Existing Job (with same location)

> **Note:**
>
> The user can only add/remove items during the job creation.
>
> If the job is based on PO or ASN, the items are automatically added from the PO or ASN and the user cannot add more items.

5. Once all details have been completed, the user can either:

- Click **Create** to create the job in New status. The Create and Maintain Job screen is closed.
- Click **Close** to cancel the job creation. A confirmation message is displayed to the user:
    - If confirmed, it closes the screen and does not create the job.

    –   Otherwise, it closes the dialog box and the user can continue with the creation process.

Create Jobs Using Spreadsheet Upload

If given permission, users are able to create jobs using the spreadsheet upload:

- Upload the spreadsheet from the Main screen.
- Upload the spreadsheet from the Upload Download screen.

Spreadsheet Upload Using the Main Screen

Users with the required permission are able to upload spreadsheets in the Quality Control dashboard screen:

1. From the side menu, select Quality Control. The dashboard screen is displayed.

2. In the table header, click **Upload**. A dialog box is displayed to upload the file.

3. Choose the file.

4. Click **Upload**.

> **✎ Note:**
>
> The upload is only available to create, submit, or cancel jobs and create or update the job checks.
>
> After uploading, the user is still required to complete some actions directly in the screen:
>
> - Complete the inspection.
> - Update the fields in the table of the items.
> - Release items.
> - Attach files to the item checks.
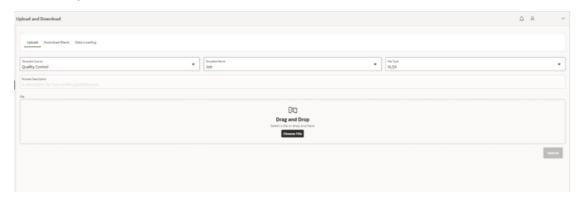
Spreadsheet Upload Using the Upload and Download Screen

Alternatively, from using the Spreadsheet Upload on the Quality Control Dashboard screen, the upload can also be completed in the Upload and Download screen, if the user has permission:

1. From the side menu, choose Upload and Download.

2. Select the Upload tab.

3. Choose Template Source > Quality Control and Template Type > Job.

4. Attach the file.

5. Click **Upload**.

> **Note:**
>
> The upload actions are the same as the ones on the dashboard screen of Quality Control.

Create Jobs Automatically

Jobs can be created automatically by the system based on the triggers on the configured Rules for Quality Control. Once the Rule is triggered, a job is created based on the definitions chosen by the Rule.

Jobs created using Rules are created in New status and the users associated to the supplier and/or locations of the job will receive a notification.

More details on Rules are available in the Manage Job Rules section.

Execute Jobs

If given permission, users are able to:
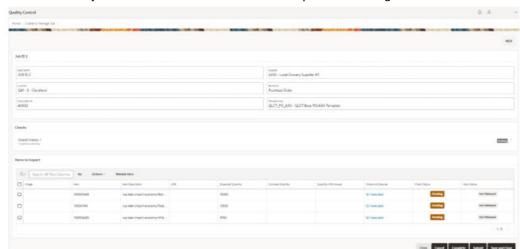
- Execute jobs using upload (create or update).
- Execute jobs using the UI.
- Submit jobs.
- Cancel jobs.

Execute Jobs Using the UI

Users with the required permission are able to execute jobs:
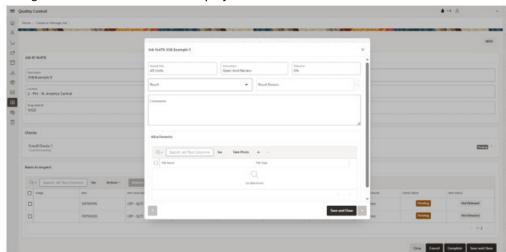
1. From the side menu, choose Quality Control to open the Dashboard Screen.

2. Search for the job to execute and click the link to open the Manage Job screen.

3. The user can view the header fields but cannot edit during the job execution.

4. Depending on the job, overall checks may be available to be executed:

    a. If available, the user can click the Overall Checks link to open the execution. The dialog box for overall checks is displayed.

- The user is able to view the following fields:
  - Inspection Sample Size (Read only)
  - Instructions (Read only)
  - Tolerance (Read only)

> **✎ Note:**
>
> These fields will be populated automatically based on the configuration in the job template applied to the job.

- The user is able to edit the following fields:
  - Result:
    - OK

* Not OK

– Result Reason

Enabled and mandatory if the result is set to NOT OK.

> **Note:**
>
> Result Reasons are configurable. For more details, see the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*.

– Comments

– Quantity Counted

Is visible and mandatory if required in the template used for the check.

> **Note:**
>
> The template job checks are defined in the Template Management screen.

b. Additionally, it is possible to add, remove, or download attachments.

- Take photos by clicking **Take Photo**.

- Attach a file by clicking the + .

- Remove attachments by clicking the – .

- Download the file by clicking the link in the File Name column.

c. The user is able to navigate to the previous or next inspection by clicking .

> **Note:**
>
> The user can navigate between checks even if not completed.
>
> If the user needs to change from the overall checks to the item checks, it is necessary to close the overall checks dialog box and open the item checks.

d. The user can close the inspection form by clicking **Save and Close**.

> **Note:**
>
> There is a system parameter configuration that allows for a job to be completed if the overall checks are NOT OK without completing the Item Checks inspection.

5. For item checks, the Jobs to Inspect grid displays the items to be inspected:

- Image (Not Editable)

- Item (Not Editable)

- Item Description (Not Editable)

- LPN (Editable)

- Expected Quantity (Editable)

- Total Counted Quantity (Editable if the count is required)

- Total Quantity with Issues (Editable if exists Item checks with result Not OK)

- Checks to Execute (Shows how many checks were executed and is the link to execute the check)

- Check Status

Check Status	Description
Pending	There are the checks pending execution.
Completed	All the checks have been executed and without issues.
Completed with issues	All the checks have been executed and one or more have issues.

- Item Status
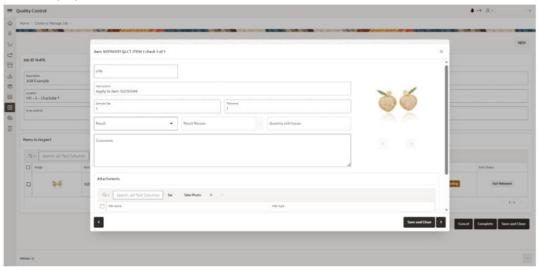
Item Status	Description
Released	The item has been released.
	Released items that have been released with the action Release and the items Released through the Complete Inspection.
Not Released	The item is not released yet.

> **Note:**
>
> Additional Custom View Only fields can be added to display additional information. To enable this feature, a Custom View needs to be modified and the additional fields enabled. See the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide* for the views available. For information on how to enable the additional fields, see the *Oracle Retail Merchandising Cloud Extensions Framework Implementation Guide* on My Oracle Support.

6. By clicking the link available in the item table in the column Checks to Execute, a dialog box is displayed. The user can execute the Item checks:

a. The following fields are only available to view:

- Inspection Sample Size

- Instructions

- Tolerance

- Item Images:

  – The user can navigate between the item images by clicking the previous and next.

  – The user can open the image on a separate tab by clicking it.

b. The following fields are editable:

- LPN

  Text field not mandatory.

  > **Note:**
  >
  > If the item has more than one check, the user can modify the LPN at any moment during the item check execution.

- Result

  – OK

  – Not OK

- Result Reason

  Only available and mandatory if the result is set to Not OK.

- Defect Classification

  Optional classification of the defect.

- Comments

- Quantity Counted

Mandatory if required in the job template used in the item.

- Quantity with issues

  Visible only if the result is set to Not OK.

> **Note:**
>
> After the dialog box is closed and if the same item has different quantities within quantity issues or counted quantities between the different checks, the Item to Inspect table is updated with the higher value set in the item checks for each one of the quantities.
>
> It is the user's responsibility to validate if this value is correct or needs to be updated, as the maximum value of the checks may not be the correct total overall counted or with issues (depending on the purpose of each check).

  c. Attachments can be added, removed, or downloaded:

- Take photos by clicking **Take Photo**.
- Attach a file by clicking the + .
- Remove attachments by clicking the – .
- Download the file by clicking the link in the File Name column.

  d. To navigate between the checks, users can select previous or next.

> **Note:**
>
> The user can navigate between item checks without restriction.
>
> Clicking next or previous will also change the item to be checked in a continuous flow.

  e. The user can close the inspection form by clicking **Save and Close**.

> **Note:**
>
> If checks are executed for more than one item, the data of all checked items is saved.

7. By clicking **Close** in the Manage Job screen, a confirmation dialog box is displayed:

Close the page?
This action will close the page without saving any changes.

Cancel   **Close**

- If the user clicks **Close**, the job execution is closed.

> **Note:**
>
> If an item was released during the execution, this action is not reverted even if the user confirms to exit without saving.

- If the user clicks **Cancel**, the dialog box closes and the user can continue with the execution process.

8. Clicking **Save and Close** in the Manage Job screen displays a confirmation dialog box:

Save and close the job?

This action will save the job and close the page.

Cancel   **Save and Close**

- If the user clicks **Save and Close**, the job execution is closed.
- If the user clicks **Cancel**, the dialog box closes, and the user can continue with the execution process.

Release Item

If given permission, users can release specific items from the job earlier if needed:

1. Navigate to the job. Select Quality Control and click the job link.

2. Select the items to release (after all checks for the items have been completed) and click **Release Item**:

   - If no issues exist with the inspections, a confirmation dialog box is displayed to release the items. The items are marked as Released.
   - If there are issues with the inspection of items, the user is redirected to the Failed Inspection Form to complete the release. For more information, see Complete Job Inspection.

   > **Note:**
   >
   > Only users with an approval role can release the item.
   >
   > After the release of the item, the action is final for that item in the job execution and cannot be canceled.
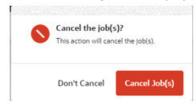
Cancel Job

Users with the required permission can cancel jobs:

1. Navigate to Quality Control from the left side menu.

2. To cancel jobs:

- If the user needs to cancel one or more jobs in a row, select the jobs in the table. Click **Cancel**. A dialog box is displayed to confirm the action.

> **Note:**
>
> Only users with the Approval permission can perform the Cancel Job Inspection.
>
> It is only possible to cancel the job if none of the items have been released yet.
>
> It is not possible to apply the same action to all selected jobs. A dialog box is displayed to the users indicating that the cancel action was not performed for all jobs.

- If the user needs to view and then Cancel a specific job, click the link of the Job ID. The manage job screen is displayed. Click **Cancel**. A dialog box displayed to confirm the action.

> **Note:**
>
> Only users with the Approval permission can perform the Cancel Job Inspection.
>
> It is only possible to cancel the job if none of the items have been released yet.

Submit Job

If given permission, users can submit jobs:

1. Navigate to Quality Control from the left side menu.

2. To submit jobs:

   - If the user needs to submit one or more jobs in a row, select the jobs in the table. Click **Submit**. A dialog box is displayed to confirm the action.

> **Note:**
>
> The submission is possible if all the checks are completed or, depending on the defined on the system parameter, for the overall checks.
>
> If, at the moment of the submit, the job cannot be submitted, a message is displayed indicating that it is not possible to submit all the selected jobs.

• If the user needs to view and then submit the specific job, click the link of the Job ID. The manage job screen is displayed. Click **Submit**. A dialog box is displayed to confirm the action.
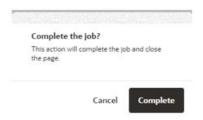
> **Note:**
>
> The submission is possible if all the checks are completed or, depending on the defined on the system parameter, for the overall checks.

Complete Job Inspection

If given permission, users can complete jobs:

1. Navigate to the job to complete: Choose Quality Control from the Menu and then choose Search the Job. Click the job to enter the Manage Job screen.

2. Validate that all the checks were completed with all the necessary data.

   Click **Complete** in the Manage Job screen. A dialog box is displayed to confirm the action.

   Complete the job?
   This action will complete the job and close the page.

   Cancel   **Complete**
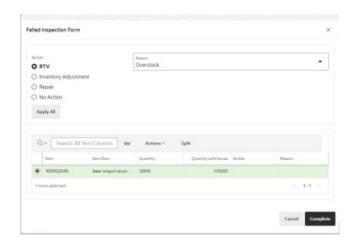
3. If the Overall Checks or the Item Checks are completed with issues, the failed inspection form is displayed to the user.

> **Note:**
>
> If the Overall Checks are completed with issues, the failed inspection form displays all the items of the job. Otherwise, it shows only the items with a status of completed with issues.
>
> If an item has been released prior to the job completion, the already released item is not displayed again.

a. An action and the reason can be selected in the header and applied to all Items by clicking **Apply All**. It will apply the Action selected and Reason to all lines in the table.

b. If items have different reasons for the failure, the user has the option to directly edit in the grid:

- Quantity with issues

> **Note:**
>
> By default, the previously inserted values are used, but the user is able to edit the value in this screen.
>
> Setting the quantity with issues equals 0 need to have the action set to No Action.

- Action
- Reason

c. If necessary, the user can also split the item by selecting the required item and clicking **Split**. This allows the user to perform multiple actions for a single item.

d. The user can click **Cancel** to close the failed inspection form without making changes. The user is redirected again to the Manage Job screen.

e. The user can click **Complete** to finish the job and execute the actions.
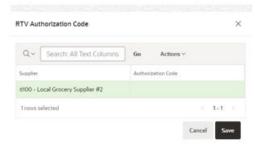
> **Note:**
>
> All items must have the action and the reason added.

- If the action is RTV:

   – If the Supplier requires an authentication code, an additional dialog box is displayed for the necessary Authorization Code. After user confirmation, it

generates the RTV in MFCS.

- If the Supplier does not allow RTVs, an error message is displayed to the user so that they may select a different action.

- If the action is RTV, the based on is Ad-Hoc, and the supplier was not chosen during the job, the RTV is created against the primary supplier of the item.

• If the action is Inventory Adjustment, a message is displayed that the user needs to complete the actions in Warehouse Management System (WMS).

• If the action is Repair, a message is displayed that the user needs to complete the actions in WMS.

• If the action is No Action, the job is completed without requiring any other action from the user.

Execute Jobs Using Upload

If given permission, users are able to execute jobs using upload:

1. Navigate to Quality Control and search for the jobs to execute.

2. Select one or more jobs on the Interactive Grid.

3. Click **Download**. The selected jobs are downloaded.

4. Make the necessary changes to the downloaded file.

5. Upload the document by clicking **Upload**.

Chapter 10
Manage Quality Control Configuration

The file is uploaded. The id of the upload process is displayed to the user in the right top corner.

6. From the side menu, choose Upload and Download. Then, select the Data Loading tab.

7. The user can check the status of the upload by searching for the previous ID displayed to the user:

   • If processed successfully, all the actions were applied to the job.

   • If processed with errors or in error, select the line of the upload process. Click **View Issues**.

     Fix the issues on the spreadsheet and repeat the process from the Step 5.

> **Note:**
>
> The upload is only available to create, submit, or cancel jobs and create or update the item job checks.
>
> The upload has limited actions that need to be performed directly in the screen:
>
> • The action of complete
>
> • The action of update fields in the table of the items
>
> • The Action of Release Items
>
> • The action of attach files to the item checks
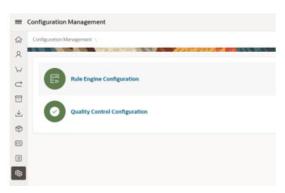
Manage Quality Control Configuration

From the configuration page, it is possible to define the job configuration:

• View and edit jobs templates through the Rule Engine Configuration.
• View and edit rules through the Quality Control Configuration.

Manage Job Templates

From the Quality Control Configuration, it is possible to create job check templates to be used on job inspections. Users are able to create, edit, or delete job templates. The following template types are available:

• PO/ASN:

   – Applies to the job header.

- – Applies to jobs that have one PO or ASN associated to the job (Based-On PO or ASN).

- – Can be applied during the manual creation or during the rule execution for automatic job creation.

- Item:

  - – Applies to items only.

  - – Can be applied during the manual creation or during the rule execution for automatic job creation.

- Ad-Hoc

  If this template is set to be applied:
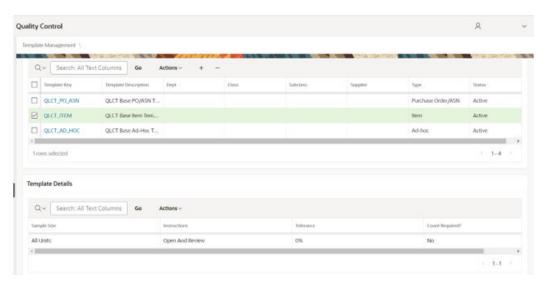
  - – Applies to all the items inserted in the job, instead of the Template type Item.

  - – Can be applied during the manual creation.

Define Job Templates

From the side menu, choose Configuration Management and then choose Quality Control Configuration.

The template management screen is displayed. The user is able to see the template header table. Selecting a template displays the Checks within the template on the table Template.
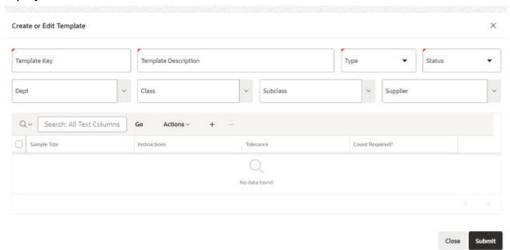
> **Note:**
>
> The Template Details are for visualization only. To edit, the user needs to click the Template Key link on the Header table.

Create Job Template

To create a job template:

1. Navigate to the Manage Template Screen. Select Configuration Management and then Quality Control Configuration.

2. Click the + icon in the Templates table. The Create or Edit Template dialog box is displayed.

a. Populate the header details:

- Template Key (Mandatory)

- Template Description (Mandatory)

- Type (Mandatory)

- Status (Mandatory)

- Dept

- Class

- Subclass

- Supplier

b. Populate the check details:

i. Click the + icon in the table. A new line is added to the table. Fill in the following columns:

- Sample Size (Mandatory)

- Instructions (Mandatory)

- Tolerance (Mandatory)

- Count Required? (Mandatory)

ii. To delete a line, select the line and click the – icon.

c. To finish, click **Submit**. A confirmation message is displayed.

- If the user clicks **Submit**, the template is created.
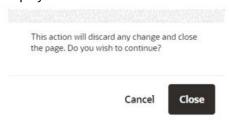
- If the user clicks **Cancel**, the confirmation message is closed and the user is able to continue the creation process.

> **Note:**
>
> To save a new template, the template must have at least one check.

d. To cancel the creation of a new template, click **Close**. A confirmation message is displayed.

- If the user clicks **Close**, the template is not created and the dialog box closes.
- If the user clicks **Cancel**, the confirmation message closes. The user is able to continue the creation template process.

Maintain Job Templates

To maintain job templates:

1. Navigate to the Manage Template Screen: Select Configuration Management and then select Quality Control Configuration.

2. To delete templates, select the job or multiple jobs from the list and click the – icon.

> **Note:**
>
> Base Templates cannot be deleted or inactivated.
>
> If a template is in use by one job already, the template cannot be deleted, it can only be inactivated.

3. To edit, click the link in the Template Key column to open the Create and Maintain Templates dialog box:

   - If the template edited is a Base Template:

     – The Template Header is not editable.

     – The Check details are editable.

     – To Add: Click the + icon. The user is able to add more checks.

     – To Delete: Click the – icon. The selected check is deleted.

     – To Update: The user can edit the following fields directly in the dynamic table:

       * Sample Size (Mandatory)

       * Instructions (Mandatory)

       * Tolerance (Mandatory)

* Count Required? (Mandatory)
- If the template edited is a non-base Template:
    - The Template Header is editable
    - Template Description (Mandatory)
    - Type (Mandatory)
    - Status (Mandatory)
    - Dept
    - Class
    - Subclass
    - Supplier
    - The Check details are editable.
    - To Add: Click the + icon. The user is able to add more checks.
    - To Delete: Click the – icon. The selected check is deleted.
    - To Update: The user can edit the following fields directly in the dynamic table:
        * Sample Size (Mandatory)
        * Instructions (Mandatory)
        * Tolerance (Mandatory)
        * Count Required? (Mandatory)
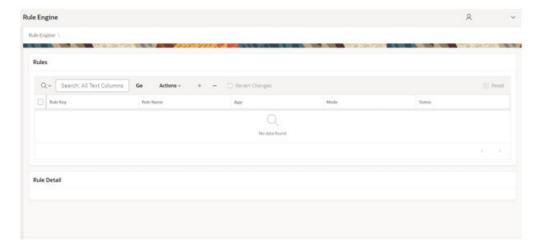
> **✏ Note:**
>
> Editing templates creates template revisions.
>
> If the edited template is already in use, the revised template will be applied only to new jobs created after the update.

Manage Job Rules

Rules are used to automatically create jobs based on certain triggers. This feature is managed on the Rules Engine screen available in Configuration Management.
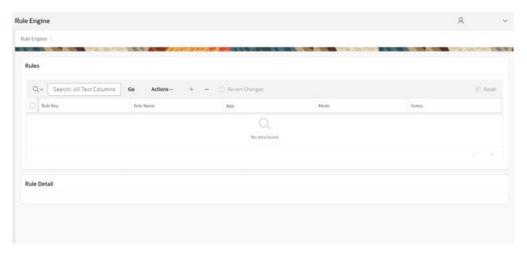
Create Rules

Users with permission to edit rules, can create new rules to be used in the Quality Control screens:
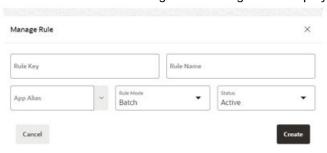
1. From the side menu, choose Configuration Management and then choose Rule Engine Configuration.

The Rule Engine screen is displayed.

2. Click the + icon. The Manage Rule dialog box is displayed.
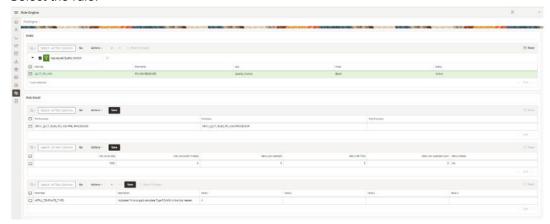
3. Add the following details:

   a. Rule Key (Mandatory) - Unique

   b. Rule Name (Mandatory)

   c. App Alias (Mandatory)

      • Select Quality Control

   d. Rule Mode (Mandatory)

      • Batch (only Batch is available at the moment)

   e. Status (Mandatory)

      • Active

      • Inactive

4. To create the rule, click **Create**.

To cancel creating the rule, click **Cancel**. The dialog box is closed and the new rule is not created.

5. Select the rule.

6. Add the necessary details under Rule Detail:

- Batch Database Functions
- Threading Information
- Rule Parameters
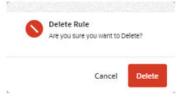
> ✏️ **Note:**
>
> To save the data in the detail tables, **Save** needs to be selected in each table.

Maintain Rules

To maintain rules:

1. From the side menu, choose Configuration Management and then choose Rule Engine Configuration.

2. Perform the required action:

- To delete the rule, select the rule to be removed. Click the – icon. A dialog box is displayed to confirm the deletion.

- – If the user clicks **Delete**, the rule is deleted.
- – If the user clicks **Cancel**, the dialog box closes and the rule is not deleted.

> **Note:**
>
> There are validations preventing some rules from being deleted. To remove rules, all data needs to be removed. Alternatively, users can inactivate rules.

- To update a rule:
  - Header: Click the link in the header table. The Manage Rule dialog box is displayed to update some of the fields:
    * Rule Key (Not Editable)
    * Rule Name (Editable)
    * App Alias (Not Editable)
    * Rule Mode (Not Editable)
    * Status (Editable)
  - Details: Select a rule and update the detail tables. All the fields are editable.

Rules available in the Quality Control

For Quality Control, the following rules are available:

> **Note:**
>
> The user is able to add and update this or other rules.

Rule Trigger

Rule	Rule Description	Trigger	Process	Status
1	PO ASN Received	Purchase Orders ASN received since the last execution: • Trigger only in the first receipt of the ASN for specific location and supplier.	For each time the trigger is enabled, create a new job with the following description: • Inspection for PO ASN [ASN ID]	Active Inactive

Rule Parameters

Rule	Rule Description	Parameter	Parameter Description	Paramater Value
1	PO ASN Received	APPLY_TEMPLATE_TYPE	Indicates if it is required to apply the template type PO/ASN in the Job to be created.	Y/N (Default: Y)

11
Supplier Penalties
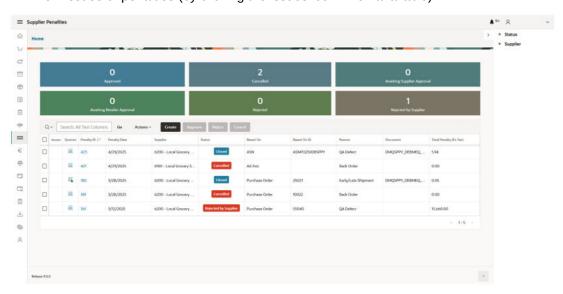
The Supplier Penalties Module objective is to automate the creation of penalties based on a supplier's identified issues. With this module, the Supplier also has visibility of the created penalties and, depending on the permission given, has the ability to approve/reject and give feedback on the penalties created for them. Users are able to:

- View and maintain penalties.
- Create penalties.
- Define, update, or view rules to automate penalties creation.

View Penalty

The main entry page of Quality Control displays several dashboards, a table with a list of jobs, and a filter on the right-hand side. From this screen, users are able to:

- Filter penalties in the right-side menu.
- Apply filters directly in the table.
- Analyze penalties that need attention.
- Create/view/reply to queries (by clicking the Queries icon).
- View issues of penalties (by clicking the issues icon when available).

Filter Penalties using the Right-Side Menu

To view and search for penalties:

1. From the side menu, select Supplier Penalties. The dashboard screen is displayed.

2. In the filter by Status and/or Supplier, the filter values availability depends on the user's permission:

- Status:

  – If the user is a retailer, the user can filter on status: Awaiting Retailer Approval, Rejected, Awaiting Supplier Approval, Rejected by Supplier, Approved, Canceled, Closed, and Error.

  – If the user is a supplier, the user can filter on status: Awaiting Supplier Approval, Rejected by Supplier, Approved, Canceled, Closed, and Error.

> **Note:**
>
> If the user is a supplier, the data displayed in the table will only be related to penalties for suppliers for which the user has permission.
>
> The filter only applies to the penalties in the table. The values in the dashboard are not affected.

- Supplier:

  – Dropdown list of Suppliers

> **Note:**
>
> The list available for supplier depends on the user permission set up in the user profile.
>
> The filter only applies to the penalties in the table. The values in the dashboard are not affected.

Apply Filters in the Penalties Interactive Table

Alternatively, it is also possible to filter the jobs directly on the Interactive Grid. Filter directly in the table columns:

- Penalty ID
- Penalty Date
- Supplier
- Status
- Based On
- Based On ID
- Reason
- Document

> **Note:**
>
> This filter only applies to the penalties in the table. The values in the dashboard are not affected.
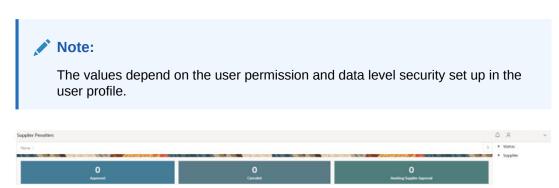
Analyze Penalties that may Need Attention

At the top of the page, there are dashboards that display counts on the overall status of the penalties. The number of dashboards visible depends on the user type:

- For a Retailer User:

  - Approved
    Count of Penalties with Approved status

  - Rejected
    Count of Penalties with Rejected status

  - Canceled
    Count of Penalties with Canceled status

  - Awaiting Retailer Approval
    Count of Penalties with Awaiting Retailer Approval status

  - Awaiting Supplier Approval
    Count of Penalties with Awaiting Supplier Approval status

  - Rejected by Supplier
    Count of Penalties with Rejected by Supplier status
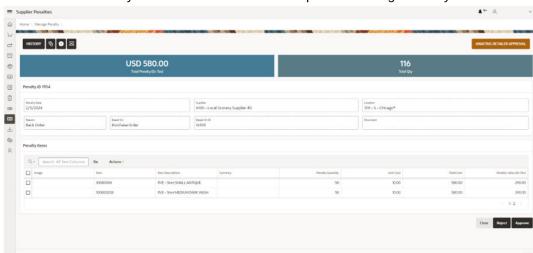
- For a Supplier User:

  - Approved
    Count of Penalties with Approved status

  - Canceled
    Count of Penalties with Canceled status

  - Awaiting Supplier Approval
    Count of Penalties with Awaiting Supplier Approval status

> **Note:**
>
> The values depend on the user permission and data level security set up in the user profile.

View a Penalty

To open one penalty and view the penalty details:

1. From the side menu, select Supplier Penalties.

2. Search for the Penalty to view and click the link to open the Manage Penalty screen.

3. The user can view the header and detail fields, but cannot edit.

> **Note:**
>
> The retailer may be able to edit the Penalty Quantity and Penalty Value but only if the penalty status is Awaiting Retailer Approval and if the retailer has the Edit or Approve permission.

4. On the penalty header, the user can also see the Penalty History, Add/Remove and/or View Attachments, View Penalty Errors, and start and/or reply to queries.

Create Penalty

Penalties can be created manually or automatically during Rules Execution:

- To create a penalty manually:

  The penalty can be Based On:

  – Purchase Order

  – ASN

  – Ad-hoc

- To create a penalty automatically, the automated creation depends on the defined rules in the Manage Rules Configuration screen.
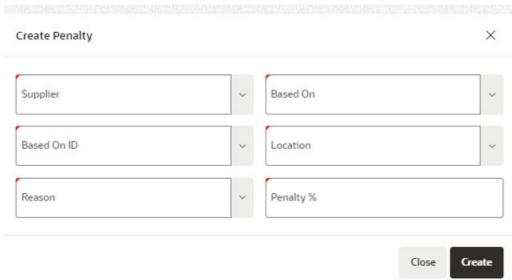
Create Penalty Manually

If given permission, the user is able to manually create a penalty:
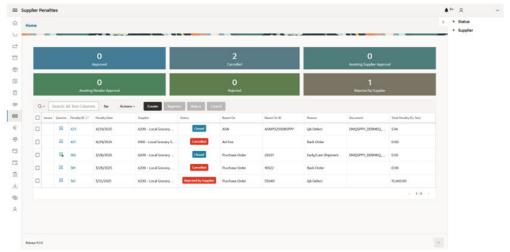
1. From the side menu, select Supplier Penalties. The Penalty Home screen is displayed.

2. In the table header, click **Create**. The Create Penalty dialog box is displayed.

3. The user is able to populate the following fields:

   • Supplier (Mandatory)

   • Based On (Mandatory)

   • Based On ID (Mandatory if not Ad-hoc)

   • Location (Mandatory; if Based On ID is populated, the values suggested are related to the selected entity)

   • Reason (Mandatory)

   • Penalty % (Mandatory)

4. Once all details have been completed, the user can either choose to create the penalty or close the dialog box:

   a. To create the penalty, click **Create**. The confirmation message is displayed. Confirm the action. The Create Penalty dialog box is closed and the Manage Penalty screen is opened to finalize the creation.

   • If the Based On inserted is Purchase Order or ASN:

     – The items suggested are from the ID inserted in the Based On ID field.
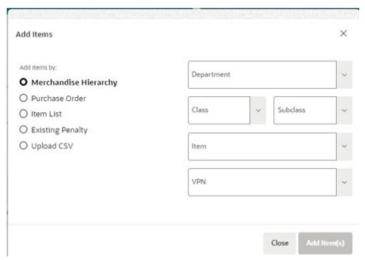
    – The user cannot add more items.

    – The user can modify the Penalty Quantity and Penalty Value.

    – The user cannot modify the Penalty header.

> **✎ Note:**
>
> If not all items are needed, set Quantity and Value to zero to ignore the item. By setting the item with zero in the Penalty Quantity and Penalty Value, that item will be ignored and when that penalty is created, the item line will not be visible (With exception in Awaiting Retailer Approval).

- If the Based On inserted is Ad-Hoc, the user needs to manually add the items. Click the + icon. A dialog box is displayed to add the items.

    The user can modify the Penalty Quantity and Penalty Value of each item. The user cannot modify the Penalty header.

- To create the penalty, click **Submit** in the Manage Penalty screen. A confirmation message is displayed to the user:

    – If confirmed, the dialog box is closed and the penalty is created.

    – Otherwise, the confirmation message is closed and the user can continue the creation process.

- To close the dialog box, click **Close**. A confirmation message is displayed to the user:

    – If confirmed, the dialog box is closed and the user is redirected to the dashboard screen. The penalty is not created and discarded.

    – Otherwise, the confirmation message is closed and the user can continue the creation process.

b. To cancel the penalty creation, click **Close** in the Create Penalty dialog box. A confirmation message is displayed to the user:

- If confirmed, the dialog box is closed and the penalty is not created.

- Otherwise, the confirmation message is closed and the user can continue the creation process.

Create Penalty Automatically

Penalties can be created automatically by the Supplier Penalties based on the triggers defined by each Rule configured for Supplier Penalties. Once a Rule is triggered, a Penalty is created based on the definitions of the Rule.

Penalties created using Rules are created on the status based on supplier options and rule parameters indicating if the penalty needs retail and/or supplier approval. The users associated to the supplier and/or locations of the penalty will receive a notification upon its creation.

For more details on rules, see Manage Penalty Rules.

Penalty Status after Creation

The penalty status after creation will depend:

*   If manual creation: on the users' permissions and supplier parameters/configurations.
*   If Automatic creation by the rule engine: on the rule parameters and supplier parameters/configurations.

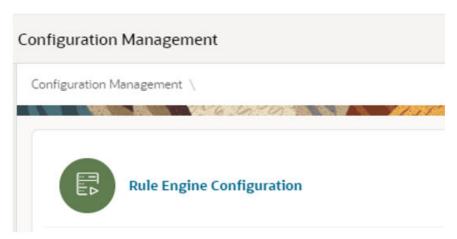| Creation Mode	Rule Parameter (Requires Retailer Approval?)	Retailer Permission	Supplier Configuration (Requires Supplier Approval?)	Supplier System Parameter (Requires Supplier Approval?)	Result
Manual	Not Applicable	Approve	Y	Y	Awaiting Supplier Approval
	Not Applicable	Approve	N	Y	Awaiting Supplier Approval
	Not Applicable	Approve	Y	N	Awaiting Supplier Approval
	Not Applicable	Approve	N	N	Approved
	Not Applicable	Edit	Y	Y	Awaiting Retailer Approval
	Not Applicable	Edit	N	Y	Awaiting Retailer Approval
	Not Applicable	Edit	Y	N	Awaiting Retailer Approval
	Not Applicable	Edit	N	N	Awaiting Retailer Approval
Rule Engine	N	Not Applicable	Y	Y	Awaiting Supplier Approval
	N	Not Applicable	N	Y	Awaiting Supplier Approval
	N	Not Applicable	Y	N	Awaiting Supplier Approval
	N	Not Applicable	N	N	Approved
	Y	Not Applicable	Y	Y	Awaiting Retailer Approval

Creation Mode	Rule Parameter (Requires Retailer Approval?)	Retailer Permission	Supplier Configuration (Requires Supplier Approval?)	Supplier System Parameter (Requires Supplier Approval?)	Result
	Y	Not Applicable	N	Y	Awaiting Retailer Approval
	Y	Not Applicable	Y	N	Awaiting Retailer Approval
	Y	Not Applicable	N	N	Awaiting Retailer Approval

Manage Supplier Penalties Rule Engine Configuration

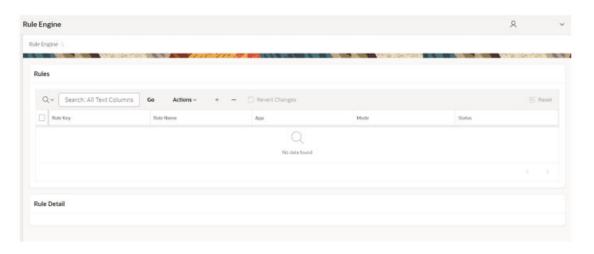From the configuration page, it is possible to define the configuration of the Rules of Supplier Penalties.

View and Edit Rules to be used by Supplier Penalties are available in the Rule Engine Configuration module.

Manage Penalty Rules

Rules are used to automatically create penalties based on certain triggers. This feature is managed on the Rules Engine screen available in Configuration Management.

Maintain Rules
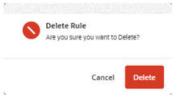
To maintain rules:

From the side menu, choose Configuration Management and then choose Rule Engine Configuration.

- To delete a rule, select the rule to be removed. Click the – icon. A dialog box to confirm is displayed.

- – If the user clicks **Delete**, the rule is deleted.
- – If the user clicks **Cancel**, the dialog box closes and the rule is not deleted.

> **Note:**
> There are validations preventing some rules to be deleted. To remove the rules, all data needs to be removed. Alternatively, users can inactivate the rules.

- To update an existing rule:
  - – Header: Click the link in the header table and the Manage Rule dialog box is displayed to allow the update of some fields:
    - * Rule Key (Not Editable)
    - * Rule Name (Editable)
    - * App Alias (Not Editable)
    - * Rule Mode (Not Editable)
    - * Status (Editable)
  - – Details: Select a Rule and update the detail tables. All the fields are editable.
  - – Rule Parameters: Select a Rule and update the parameter detail table.

– Rule Attributes: Select a Rule and click **Rule Attributes** to edit the Rule Attributes.

Rules available on Supplier Penalties

The following rules are available out of the box for the Supplier Penalty.

Rule Trigger

Rule	Rule Description	Trigger	Process	Status
1	Early/Late Shipment	All Received Shipments for suppliers who are configured for penalties.	Compare the Shipment Receive Date with the PO Not After Date against the Number Days defined at Rule Attribute Level.	Active Inactive
2	Defective QA	All QC jobs for POs or ASNs for suppliers who are configured for penalties and the item expected qty is above 0 for at least one item.	Compare Item quantity with issues with the total Item quantity expected and validate if it is above the Defect Threshold Percentage defined at Rule Attribute Level.	Active Inactive
3	Cancel PO	All Closed POs that have quantity canceled for configured suppliers with a specific reason code.	Compare Item quantity canceled with the total Item quantity and validate if is above the Cancel Threshold Percentage defined at Rule Attribute Level and the cancel code used is the defined in the Rule Parameters.	Active Inactive

Rule Parameters

Rule	Rule Description	Parameter	Parameter Description	Parameter Value
1	Early/Late Shipment	Process After Days	Indicates how many days to wait after the receipt to validate if a penalty needs to be created.	Numeric Value
1	Early/Late Shipment	Requires Retailer Approval	Indicates if the Penalty created by the rule engine needs manual Retailer Approval.	Values: Y/N
2	Defective QA	Requires Retailer Approval	Indicates if the Penalty created by the rule engine needs manual Retailer Approval.	Values: Y/N
3	Cancel PO	Requires Retailer Approval	Indicates if the Penalty created by the rule engine needs manual Retailer Approval.	Values: Y/N
3	Cancel PO	Cancel Code	Indicates which Purchase Orders Cancel code will be considered by the Rule.	Values: Alphanumeric (Default: V)

Rule Attributes

Rule	Rule Description	Attributes
1	PO ASN Received	Supplier (Non-Mandatory Field)
		Po Type (Non-Mandatory Field)
		Applicable To (Mandatory Field)
		Penalty % (Mandatory Field)
		Number Days (Mandatory Field)
2	Defective QA	Supplier (Non-Mandatory Field)
		Po Type (Non-Mandatory Field)
		Penalty % (Mandatory Field)
		Defect Threshold (Mandatory Field)
3	Cancel PO	Supplier (Non-Mandatory Field)
		Po Type (Non-Mandatory Field)
		Penalty % (Mandatory Field)
		Cancel Threshold (Mandatory Field)

Create New Rules

Users with permission to edit rules, can create new rules to be used by Supplier Penalties.
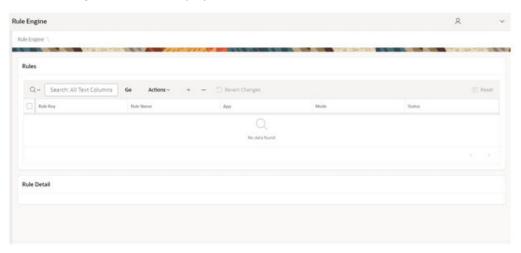
> **Note:**
>
> Creating new rules requires design and coding of new database functions/packages to implement the rule logic.

To create a new rule:

1. From the side menu, choose Configuration Management and then choose Rule Engine Configuration.
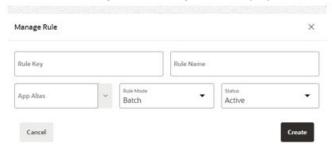
   The Rule Engine screen is displayed.
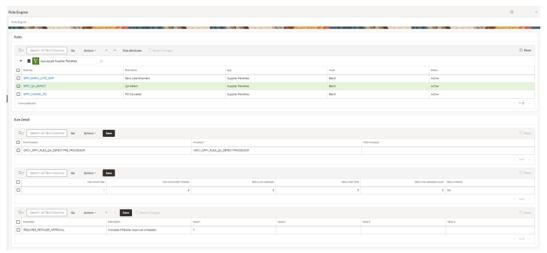
2. Click +. The Mange Rule dialog box is displayed.

3. The user can add the following details:

- Rule Key (Mandatory) - Unique

- Rule Name (Mandatory)

- App Alias (Mandatory)

  – Select Supplier Penalties

- Rule Mode (Mandatory)

  – Batch (only Batch available now)

- Status (Mandatory)

  – Active

  – Inactive

4. Click **Create** to create the rule.

Click **Cancel** to close the dialog box without creating the new rule.

5. Select the rule.

6. Add the necessary details under Rule Detail:

- Batch Database Functions

- Threading Information

- Rule Parameters

> **Note:**
>
> To save the data in the detail tables, **Save** needs to be clicked in each table.

Add the necessary details in the Rule Attributes by clicking **Save**.

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Retail Price

The Retail Price module facilitates the collaboration between retailers and suppliers on the creation and maintenance of new Price Events (Price Changes and Simple Promotions). Depending on user permission, each user is able to:

- View and download price events.
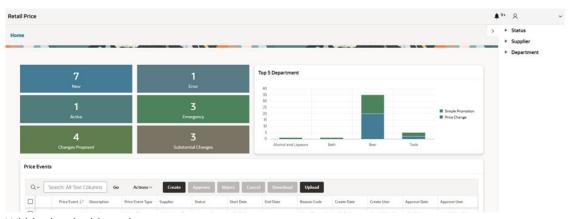- Create new price event using the UI.
- Approve, reject, and cancel price events.
- Propose changes to price events.
- Upload new price events or update existing non-extracted price events.
- Create/view/reply to queries (by clicking the Queries icon).
- View issues of price events (by clicking the issues icon when available).

View and Download Price Events

Within the dashboard screen, users can:

- View dashboards with key information:
  - Price event status
  - Top 5 Departments with price events
- View the list of price events.
- Apply filters directly in the results table or using the Facet Search menu.
- Order results directly in the table.
- Create new price event.
- View or edit a price event (by clicking the ID).
- Upload price event.
- Do multiple actions to the price events:
  - Download (one or multiple price events selected).

- Reject a price event (one or multiple price events selected).

- Approve a price event (one or multiple price events selected).

- Cancel a price event (one or multiple price events selected).
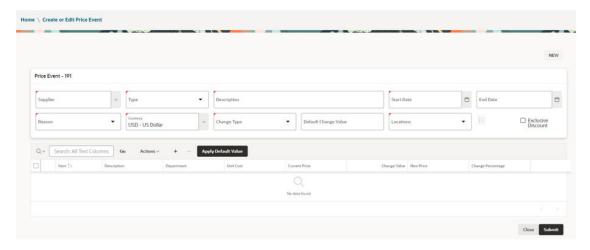
Download Price Events

To download price events:

1. From the side menu, choose Retail Price.

2. In the Retail Price screen, select one or more price events to download.

3. Click **Download**. A spreadsheet is downloaded containing the selected price events data.

Create New Price Events Using the UI

If given permission, users can create new Price Events using Retail Price.

1. From the side menu, choose Retail Price.

2. In the Retail Price screen, click **Create Price Event**. The Price Event is created in New status. Multiple sections need to be populated.

Update the Price Event Header

To update the price event header:

1. The Price Event has a Price Event ID which is the identifier of the price event. This is created automatically.

2. In the Header Price Event screen, enter the following information:

   a. Supplier (mandatory)

   b. Type (mandatory) - choose between available values:

      • Price Change

      • Simple Promotion

   c. Description (mandatory)

   d. Start Date (mandatory)

e. End Date

> **Note:**
>
> If the event is of the Price Change type, the End Date field is disabled. For Simple Promotions, the End Date requirement can be configured at the Supplier Level.

f. Reason (mandatory) - choose between the available values:

- If Price Change, the list of Reason Codes is driven from the RPCS list of Price Change Reason Codes (from Code Type: PCRC).

- If Simple Promotion, the list of Reason Codes is driven from the Retail Price list of Promotion Reason Codes (from Code Type: PEPR).

g. Currency (mandatory) - populated automatically based on the default value set at the supplier level. It can be changed based on available currencies.

h. Change Type (mandatory) - choose between the available values:

- Percentage

- Amount

- Fixed Price

i. Default Change Value (not mandatory)

> **Note:**
>
> The Default Change Value field is used to default the Change Value for any new item added to the price event. Updating the Default Change Value and clicking **Apply Default Value** will apply the value to all items on the Items Grid.

j. Locations (mandatory) - choose between the available values:

- Select Locations

- All Locations

> **Note:**
>
> If Select Locations is chosen, the user is required to pick which locations are to be included on the Price Event using the Manage Locations dialog box.

k. Exclusive Discount flag (not mandatory) - Default set to No.
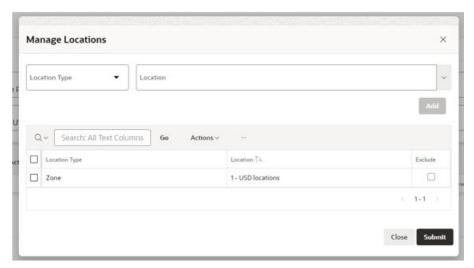
> **Note:**
>
> Only available for Simple Promotions.

Manage Locations

In the Manage Locations dialog box, it is possible to add, remove, or exclude locations:
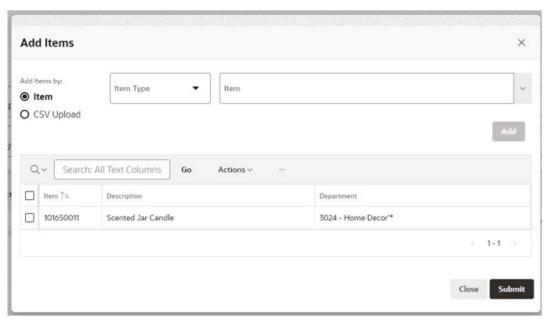
1. To add locations, enter the following information:

   a. Location Type - choose between the available values:

      - Store

      - Zone

   b. Location

2. To remove locations, select the record to be deleted and click the – icon to remove the locations.

3. To exclude locations, select the flag.

Add Items

In the Items Detail section, it is possible to add or remove items:

- To add items for the price event, click the **+** icon.

- To remove items from the price event, select the record to be deleted and click the – icon.

To add items:

1. In the Details table, click the **+** icon.

2. In the Add Items dialog box. enter the following information. Add items by choosing between the available values:

   • Item - choose between the available options to add items by:

     – Item - select the list of MFCS items for the price event.

     – Item description - select the list of MFCS items for the price event based on description.

     – SKU - select the list of MFCS items for the price event.

     – Style - select the list of MFCS items for the price event.

     – Barcode - select the list of MFCS items for the price event based on barcode.

     – VPN - select the list of MFCS items for the price event based on VPN.

   • CSV Upload - choose the file.

3. Click **Add** to add the selected items to the table with the list of items to be added to the price event. If required, it is possible to remove items before submitting them directly on the table.

4. Click **Submit** to add the selected list of items to the price event.

5. Click **Close** to close the dialog box without saving the items.

> ✏️ **Note:**
>
> If Pricing Control is enabled, users will only be able to submit items based on their user type. This functionality is only available if Pricing Control is enabled on MFCS and RPCS Release 24.0.101.0+.

Propose Changes a to Price Event

It is possible to edit a Price Event if the Price Event has not been sent to RPCS:

1. From the side menu, choose Retail Price.

2. In the Retail Price, select the Price Event that requires changes.

3. In the Create or Edit Price Event screen, click **Edit**.

4. Make the changes required to the Price Event.

5. After changes are done, click **Submit**.

6. In the Reason dialog box, complete the Reason Code and Comments. Click **Submit**.

   If the user has approval permissions, the price event will automatically go through the approval process to be sent to RPCS; if not, the price event status will change to Changes Proposed and wait for the changes to be approved by a Retailer User.

> **Note:**
>
> If the Supplier user does not have Approval permission, the Approval Retailer should receive notifications of pending Event Approval.
>
> If the Price Event contains at least one Substantial Change and the user is a Supplier, even if the supplier has an Approval Role, the Price Event cannot be approved (using auto approve or manual approval). Only a Retailer User is able to Approve.

Cancel a Price Event

Price Events can be canceled if they have not been sent to RPCS:

1. From the side menu, choose Retail Price.

2. In the Retail Price screen, select one or more price events to cancel.

3. Click **Cancel**. The price event goes to Cancel status.

> **Note:**
>
> Only Simple Promotions can be canceled after being sent and become active in RPCS.

Approve/Reject New or Changed Price Events

To perform approval of a new or changed price event or to reject, a user with Approval permissions is required. These actions can be performed using the Retail Price Dashboard page or from the Create or Edit Price Event screen:

1. If a Price Event is in New or Changes Proposed status, the user can review the Price Events and decide to Approve/Reject it.

2. From the side menu, choose Retail Price.

3. In the Retail Price screen, select one or more Price Events to Approve/Reject.

4. Click **Approve/Reject**.

5. If rejecting, the Reject Reason dialog box is displayed. Select a reason and/or add comments.

> **Note:**
>
> A Rejected Price Event by the user can be updated and submitted again.

View Issues

If there are issues during price event submission due to validation or errors, the errors found will be listed and can be viewed by clicking the ◉ icon on the Create or Edit Price Event screen or the icon in the first column of the search screen table. The icon will be different based on the issue level. A window is displayed with a list of issues that were found.
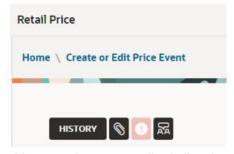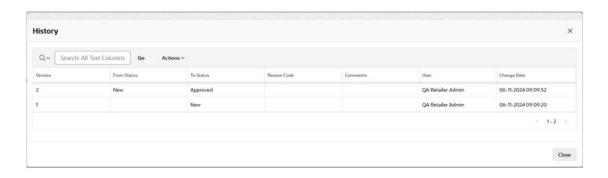

> **Note:**
>
> Retail Price uses Custom Validations. New validations can be added. For a list of all the validations being performed, see the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*. For information on how to set up new validations, see the *Oracle Retail Merchandising Cloud Extensions Framework Implementation Guide* on My Oracle Support.

View History

The history of updates to a price event performed in Retail Price can be viewed by clicking **History** in the top left corner of the Create or Edit Page.

This page shows an audit of all actions, when they were performed and by whom, and includes details of status changes and comments to updates.

Create and Update Price Events Using Upload

Alternatively to using the front-end screens to create and update price events, the user can choose to do the actions using the Spreadsheet upload. This allows the user to make multiple changes at the same time, in a single step.

Create New Price Event Using Upload

To create a new price event by uploading a spreadsheet:

1. From the side menu, choose Upload and Download.

2. Select the Download Blank tab.

3. Choose Template Source > Retail Price.

4. Choose Template Name:

   - Simplified Price Event Creation - spreadsheet with a single tab (used for creation only).

   - Price Events - spreadsheet with three tabs (header, detail, and location).

5. Click **Download**.

6. Populate the Price Event Details on the downloaded spreadsheet.

7. Upload the Price Event using the Retail Price screen or in the Upload and Download screen:

   a. Select the Upload tab.

   b. Choose Template Source > Retail Price.

   c. Choose Template Name:

      - Simplified Price Event Creation - spreadsheet with a single tab (used for creation only).

      - Price Events - spreadsheet with three tabs (header, detail, and location).

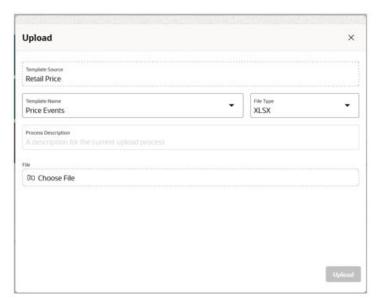   d. Choose a file.

   e. Click **Upload**.

Change Existing Price Events Using Upload

To make changes to existing price events by uploading a spreadsheet:

1. From the side menu, choose Retail Price.

2. In the Retail Price, select the price events that require changes.

3. Click **Download**.

4. Make the changes in the downloaded spreadsheet.

5. Click **Upload**.

6. In the Upload dialog box, select the file with the changes.

7. Click **Upload**.

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Appointments Management

The Appointments Management application main purpose is to allow suppliers to book appointments at Retailer's locations for a delivery of an ASN or for a pickup of an RTV. Depending on user permission, a user is able to:
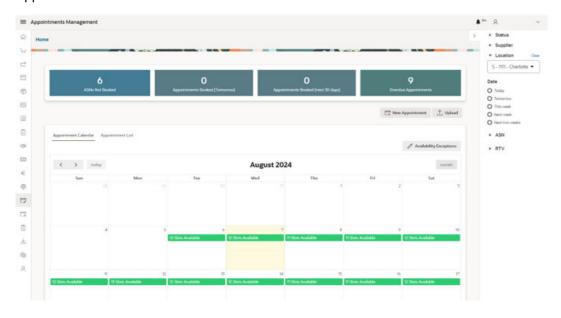
- View and download appointments.
- Create new appointment using the UI.
- Approve, check in, receive, and cancel appointments.
- Upload new appointments and slots.
- Download slots.
- Manage slot exceptions.

View and Download Appointments

Once a user logs in to Appointments Management, they have to select a location on the facet search to view any data. If the user only has access to one location, the location will be auto selected.

After the location is selected, on the Home Screen, there are two tabs, two buttons, and a Facet Search that are available:

- Buttons:
  - New Appointment
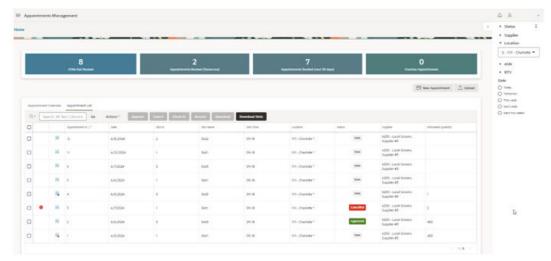 - Upload
- Appointment Calendar

- Visual view of the number of available, booked, and unavailable slots, based on user permissions.

    - **Availability Exception** button (only available for users that can manage slots).

    - Clicking an Available slot opens the Create Appointment Modal page.

> **Note:**
>
> The Appointment calendar only displays data up to a set configured number of days, by default the value is 90 days. To change this value, see the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*.

- Appointment List

    List of created Appointments, that contains the following details:

    - Issues

    - Queries

    - Appointment Details (Date, Slot, Location, Status, and Supplier)

    - Table Action buttons:

        * View Appointment (by clicking the ID)

        * Send Queries

        * Upload Appointments

        * Upload Slots (only available to Retailer user type with Edit Slot permission)

        * Download (one or multiple Appointments selected)

        * Download Slots (only available to Retailer user type with View/Edit Slot permission)

        * Cancel Appointment (one or multiple Appointments selected)

        * Approve Appointment (one or multiple Appointments selected)

        * Receive Appointment (one or multiple Appointments selected)

        * Check-in Appointment (one or multiple Appointments selected)

- Facet Search

Apply filters directly in the results table or using the Facet Search menu:

– Status

– Supplier

– Location

– Date

– ASN

– RTV

Download Appointments

To download appointments:

1. From the side menu, choose Appointments Management.

2. In the Appointments Management screen, click the Appointment List Tab, and select one or more Appointments to download.

3. Click **Download**. A spreadsheet is downloaded containing the selected Appointments data.

Download Slots

To download shots:

1. From the side menu, choose Appointments Management.

2. In the Appointments Management screen, click the Appointment List Tab.

3. Click **Download Slots**.

4. In the Download Slots dialog box, select the location and click **Download**. A spreadsheet is downloaded containing all the slots that the user has access to (only locations that the user has access to).
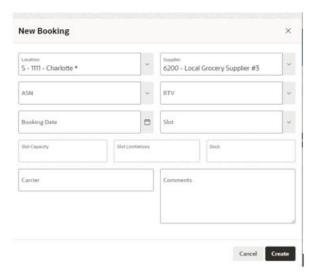
> **✎ Note:**
>
> Only available to the Retailer user type with the View or Edit slot maintenance role.

Create Appointments Using the UI

Users can create new Appointments using the Appointments Calendar by clicking the available slot and or by clicking **New Appointment**.

To create a new appointment:

1. From the side menu, choose Appointments Management:

   • In the Appointment Calendar screen, click the Slots Available Label.

   • In the Appointment List screen, click **New Appointment**.

   A New Booking dialog box is displayed. Multiple sections need to be populated.

2. In the New Booking dialog box, the user needs to enter the following information:

   a. Location (mandatory)

   > **Note:**
   >
   > Prepopulated with selected location on the Home page.

   b. Supplier (mandatory)

   > **Note:**
   >
   > Prepopulated if the user only has access to one supplier.

   c. Type (mandatory) - choose between available values:

   • ASN (one or multiple selected)

   • RTV (one or multiple selected)

   > **Note:**
   >
   > Only ASN or RTV can be selected, not both.

   d. Booking date (mandatory)
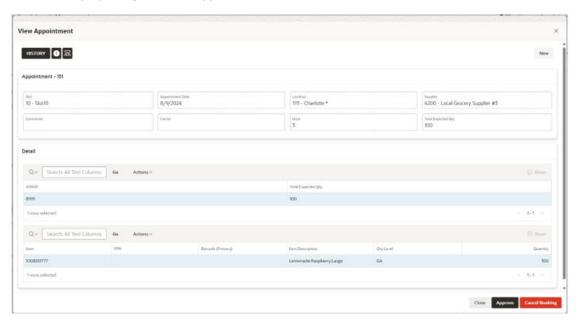
> **Note:**
>
> Prepopulated if the user chooses the slot directly from the calendar.

 e. Slot (mandatory)

 f. Slot Capacity (not editable)

 g. Slot Limitations (not editable)

 h. Dock (not editable)

 i. Carrier (not mandatory)

 j. Comments (not mandatory)

> **Note:**
>
> Slot Capacity, Limitations, and Dock are values associated with the selected slot.

Once the user enters the information, the appointment is created and an ID is assigned. It can be viewed by opening it on the Appointment List.

Cancel Appointment

To perform a cancellation of an Appointment, a user with Approval or Edit permissions is required. These actions can be performed using the Appointment List page or from the View Appointment screen. Appointments can be canceled while the receipt process has not started:

1. From the side menu, choose Appointments Management.

2. In the Appointment List screen, select one or more Appointments to cancel.

3. Click **Cancel**.

4. In the Cancel Reason dialog box, select a reason and/or add comments. The appointment status will be updated to Cancel status.

> **Note:**
>
> Appointments can only be canceled while in New and Approved status.

Approve Appointments

To perform approval of an Appointment, a user with Approval permission is required. These actions can be performed using the Appointment List page or from the View Appointment screen:

1. From the side menu, choose Appointments Management.

2. In the Appointment List screen, select one or more Appointments to approve.

3. Click **Approve**. Appointments will be set to Approve status.

> **Note:**
>
> Appointments can only be approved while in New status. If the Supplier User does not have Approval permission, the Approval Retailer should receive notifications of Pending Appointment Approval.

Check in Appointments

To perform the check in of an Appointment, a user with Approval or Edit permission is required. These actions can be performed using the Appointment List page or from the View Appointment screen:

1. From the side menu, choose Appointments Management.

2. In the Appointment List screen, select one or more Appointments to check in.

3. Click **Check-in**. Appointments will be set to Check-in status.

> **Note:**
>
> Appointments can only be checked in while in Approved status.

Receive Appointments

To perform a manual receipt of an Appointment, a user Retailer with Approval permissions is required. These actions can be performed using Appointment List page or from the View Appointment screen:

1. From the side menu, choose Appointments Management.

2. In the Appointment List screen, select one or more Appointments to receive.

3. Click **Receive**. Appointments are set to Receive status.

> **Note:**
>
> Appointments can only be received while in Approved and Checked-in status. This will not perform any receipt in MFCS, only manually updates the status. The status will be automatically changed to Received once an ASN is received in MFCS.

View History

The history of updates to an appointment can be viewed by clicking **History** in the top left corner of the View Appointment screen.

This page shows an audit of all actions, when they were performed and by whom, and includes details of status changes and comments to updates.

Create and Update Appointments Using Upload

Alternatively, to using the screens to create and update appointments, the users can choose to do the actions using the Spreadsheet upload. This allows them to do multiple changes at the same time, in a single step.

New Appointment Using Upload

To create a new appointment by uploading a spreadsheet:

1. From the side menu, choose Upload and Download.

2. Select the Download Blank tab.

3. Choose Template Source > Appointments Management.

4. Choose Template Name > Appointments.

5. Click **Download**.

6. Populate the Appointment Header and Details on the downloaded spreadsheet.

> **Note:**
>
> The Appointments Items tab is only used for download. It will be populated with the items from the selected ASNs or RTVs.

7. Upload the Appointment using the Appointments Management screen or in the Upload and Download screen:

    a. Select the Upload tab.

    b. Choose Template Source > Appointments Management.

    c. Choose Template Name > Appointments.

    d. Choose a file.

    e. Click **Upload**.

Status Changes to Appointments using Upload

To make status changes to appointments using upload:

1. From the side menu, choose Appointments Management.

2. In the Appointments Management, select the appointments that requires status changes.

3. Click **Download**.

4. Make the necessary changes on the downloaded spreadsheet.

5. Click **Upload**.

6. In the Upload dialog box, select the file with the changes.

7. Click **Upload**.

Create and Slots Using Upload

These actions can be performed using the Appointment List page or from the Upload and Download menu.

Create a New Slot Using Upload

To create a new slot using an upload:

1. From the side menu, choose Upload and Download.

2. Select the Download Blank tab.

3. Choose Template Source > Appointments Management.

4. Choose Template Name > Slots.

> **✎ Note:**
>
> The Slots template is only available to the Retailer user type with the View or Edit slot maintenance role. The Supplier user type cannot download and upload slots.

5. Click **Download**.

6. Make the necessary changes on the downloaded spreadsheet.

7. Upload the file using the Upload and Download screen.

    a. Select the Upload tab.

    b. Choose Template Source > Appointments Management.

    c. Choose a Slot Template.

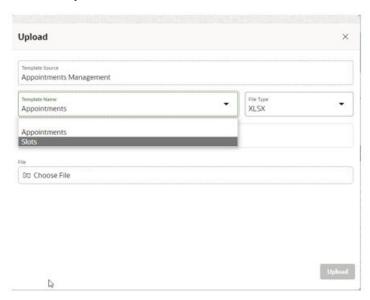   **d.** Choose a file.

e. Click **Upload**.

Update Slots Using Upload

To update a slot using an upload:

1. From the side menu, choose Appointments Management.

2. In Appointments Management, click the Appointment List Tab.

3. Click **Download Slots**.

4. In the Download dialog box, select the location and click **Download**.

5. Make the necessary changes on the downloaded spreadsheet.

6. Click **Upload**.

7. In the Upload dialog box, select the Slot Template and the file with the changes.

8. Click **Upload**.
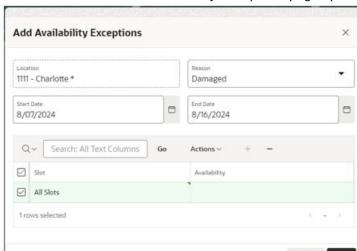

Availability Exceptions

When slots need to be temporarily blocked, a Retailer user that can manage slots can use the Availability Exceptions button, available on the calendar tab, to navigate to the Manage Slot Exception Modal pages:

1. From the side menu, choose Appointments Management.

2. In Appointments Management, click the Appointment Calendar Tab.

3. Click **Availability Exceptions**. The Manage Slot Exception Modal page opens based on the selected location.

4. On the modal page, the user can view/add/remove exceptions of availability.

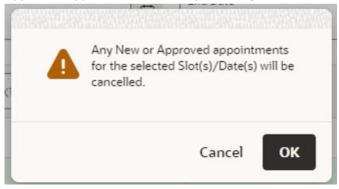# Add Availability Exceptions

To add availability exceptions:

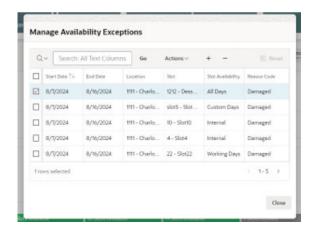1. Click the + icon. The Add Availability Exceptions page opens.

2. Populate the necessary fields:

   - Reason

   - Start Date

   - End Date

   - Slots to be unavailable

3. Click **Add.** A warning confirmation is displayed, as continuing may Cancel any New or Approved Appointments that may be using the selected slots.

4. Once confirmed, the dialog box closes and the user moves back to the Manage Slot Exceptions modal page. On the Calendar view, the slots will be marked as Unavailable.

Remove Availability Exceptions

To remove an exception, on the Manage Slot Exceptions modal page:

1. Select one or more exceptions to be removed.

2. Click the – icon. A confirmation dialog is shown and the user confirms to remove.

The exceptions are removed and the slots are available for use again.

> **Note:**
>
> Removing the exception will not reinstate any canceled appointments.
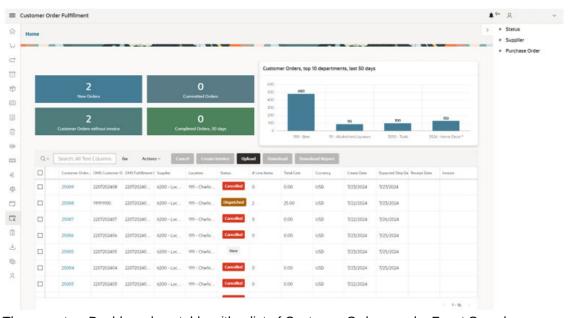
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Customer Order Fulfillment

Customer Order Fulfillment allows Retailers to share Customer Orders fulfilled by the Supplier and allows the Supplier to commit, share shipment status and, if Customer Order Fulfillment is used as the entry point for Customer Orders fulfilled by the Supplier, it also allows Suppliers to aggregate into a single Invoice.

Depending on the user's permissions, a user is able to:

- View and download customer orders.
- Commit orders.
- Dispatch orders.
- View history, mange attachments, and raise queries.
- Mange invoice orders.
- Update customer orders using an upload.

View/Download Customer Orders

After the user logs in to Customer Order Fulfillment, the user is shown the following screen. All the data displayed is based on the user permissions and data level security.

There are two Dashboards, a table with a list of Customer Orders, and a Facet Search:

- Customer Order Status Dashboard:
  - Provides a quick view of the relevant Customer Order status.
  - Available Status on Dashboard:
    - * New Orders

- * Committed Orders

- * Completed Orders without Invoice

  Only available when Customer Order Fulfillment is the entry point for Supplier-sourced Customer Orders.

- * Completed Orders

  When MFCS is the entry point, this will count the Customer Orders that have been dispatched.

- Customer Orders Chart

  This chart has the total cost of the top 100 departments over the last 30 days. The data is not real time and is refreshed frequently during the day, depending on the refresh schedule.

- List of Customer Orders:

  – Customer Order Details (Customer Order Number, OMS Order Number, OMS Fulfillment Order Number, Supplier, Location, Status, and more details).

  – Create/view/reply to queries (by clicking the Queries icon).

  – View issues of customer orders (by clicking the issues icon when available).

  – Action buttons on the table:

    * Cancel (only available if it is possible to integrate the cancellation into OMS)

    * Create Invoice (only available if Customer Order Fulfillment is the entry point of the Supplier Sourced Customer Orders)

    * Upload

    * Download

    * Download Report

- Facet Search

  Apply filters directly in the results table or using the Facet Search menu:

  – Status

  – Supplier

  – Purchase Order

Download Customer Orders

To download a spreadsheet with a set of selected customer orders:

1. From the side menu, choose Customer Order Fulfillment.

2. In the Customer Order Fulfillment screen, select one or more customer orders to download.

3. Select **Download**. A spreadsheet is downloaded containing the selected customer orders data.
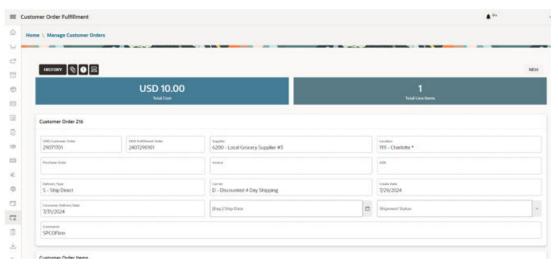
Download Customer Order Report

In addition to the standard spreadsheet included in the applications of Supply Chain Hub, it is also possible to provide to Suppliers a custom report that may contain additional data not available on Customer Order Fulfillment, for example, customer details to Suppliers:

1. From the side menu, choose Customer Order Fulfillment.

2. In the Customer Order Fulfillment screen, select one or more customer orders to download.

3. Select **Download Report**. A spreadsheet is downloaded containing the selected customer orders data.

> **✏ Note:**
>
> This report needs to be created on a Reporting tool and set up in Customer Order Fulfillment; it is not included out of the box. For details about the setup, see the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*.

Commit Orders
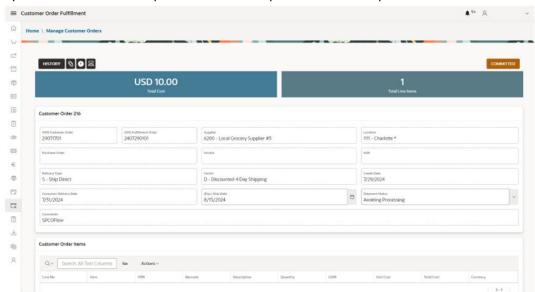

To commit orders:

1. From the side menu, select Customer Order Fulfillment.

2. In the Customer Order Fulfillment screen, click the ID of the new customer order. A detail screen opens and displays the Customer Order details.

3. Update the Estimated Shipment date and Shipment Status.

4. Click **Commit** and confirm the change.

Dispatch Orders

To dispatch orders:

1. From the side menu, select Customer Order Fulfillment.

2. In the Customer Order Fulfillment screen, click the ID of the new customer order. A detail screen opens and displays the Customer Order details.

3. Update the Estimated Shipment date and Shipment Status if required.

4. Click **Dispatch** and confirm the change.

View History/Manage Attachments/Raise Queries

When opening a customer order, users are able to perform different actions against the customer order:

- View history.
- Add/remove attachments.

   The supplier and retailer can share information using documents, that can be attached to the customer order.

- View validation errors.

   When actions fail, users are able to see errors in the Validations screen.

- Raise queries.

   Suppliers can interact with retailers for each customer order, by raising a query. Retail teams will be notified when a query is raised or answered.

The history of updates of a customer order can be viewed by clicking **History** on the top left corner of the Manage Customer Order screen.
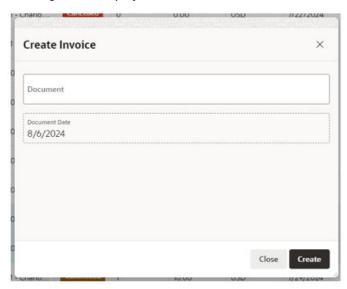

This page shows an audit of all actions, when they were performed and by whom, and includes details of status changes and comments to updates.

Invoice Orders

If Customer Order Fulfillment is the entry point of the supplier-sourced customer orders then a user, if given permissions, will be able to invoice one or multiple customer orders at the same time. Once a customer order has been dispatched, the invoice can be created:
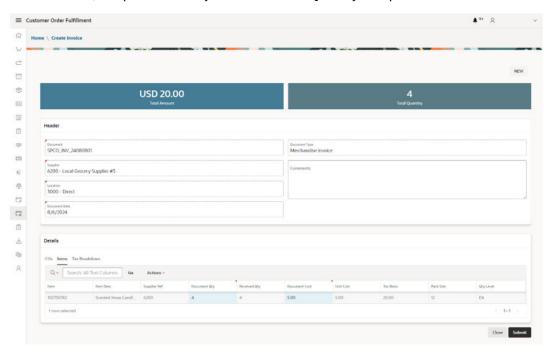
1. From the side menu, choose Customer Order Fulfillment.

2. Choose one or more dispatched customer orders.

3. Click **Create Invoice.**

   A dialog box is displayed to choose the Document ID to be used.

4. Click **Create**. A new page is displayed with the invoice details.

   The Invoice data is pre-populated with the selected customer order data. On the Item Details screen, it is possible to adjust the Cost and Quantity if required.

5. Once ready, click **Submit** to create the invoice.

6. Once submitted, the user is redirected to the Homepage. The status of the customer orders is changed to Processing Invoice while the invoice is integrated.

Update Customer Orders using Upload

The actions of Status Update can also be executed using the Spreadsheet upload:

1. From the side menu, choose Customer Order Fulfillment.

2. In the Customer Order Fulfillment, select the Customer Orders that need to be updated.

3. Click **Download**.

4. Make the necessary changes on the downloaded spreadsheet.

5. Click **Upload**.

6. In the Upload dialog box, select the file with the changes.

7. Click **Upload**.

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Financial Summary

The Financial Summary application allows retailers to share payment information status with their suppliers, including what documents are included in each payment.
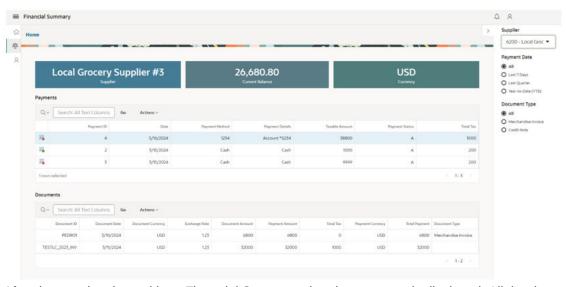
> **Note:**
>
> The payment information is provided by the Financial system and integrated into Supply Chain Hub. The values displayed in the module can be different depending on the Financial System used.

Depending on user permissions, a user is able to:

- View payment information.
- Raise queries.

View Payment Information

After the user has logged in to Financial Summary, the above screen is displayed. All the data displayed is based on the user's permissions and data level security. If the user has access to multiple suppliers, they have to select a supplier first before viewing any data. If the user has access to a single supplier, that supplier will be defaulted.

Within the dashboard screen, users can:

- View Dashboards with key information:
  - Selected Supplier
  - Active Deals
  - Currency

- Apply filters directly in the results table or using the Facet Search menu:

    – Filter by Supplier, Payment Date, and/or Document Type.

- Order results directly in the table.

- View the list of payments:

    – For the selected payment, view the documents (Merchandise Invoices, and so on) included in the payment.

- Raise queries:

    – Suppliers can interact with retailers for each payment, by raising a query ( ). Retail teams are notified when a query is raised or answered.
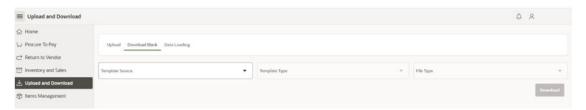
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Upload and Download

As shown in previous chapters, users are able to download/upload spreadsheets for mass maintenance of data. Using this module, the user can:

- Download a blank spreadsheet.
- Upload files.
- View data loading results, including status and possible errors.

Download Blank Spreadsheet

Using the Download Blank functionality, the user can obtain a clean template spreadsheet that can be used to populate and load data for the selected template:
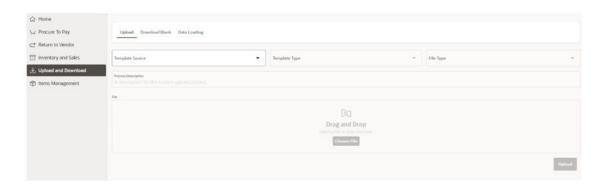
1. From the side menu, choose Upload and Download.
2. Select the Download Blank tab.
3. Select the Template Source, Template Type, and File Type.
4. Click **Download**.

Upload File

Users can upload files using the upload functionality:

1. From the side menu, choose Upload and Download.
2. Select the Upload tab.
3. Select Template Source, Template Type, and File Type.
4. Attach the file.
5. Click **Upload**.

Data Load Results

After the file is processed, the user is able to see the results of the upload:

1. From the side menu, choose Upload and Download.

2. Select the Data Loading tab.

3. View the processes executed and filter using the different filters.

4. If the upload failed with errors, view the errors by clicking **View Issues**.