

Retek[®] Price Management[™] 11.0

User Guide

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

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Chapter 1 – Welcome to RPM

Overview

Retek Price Management™ (RPM) is a strategy based pricing solution that suggests and assists with pricing decisions. With RPM, retailers are empowered to automate and streamline pricing strategies across the organization that yields a more predictable and profitable outcome. It provides decision support to all pricing-focused business information at the retailer's fingertips to validate and approve pricing and markdown suggestions. This approach results in higher margins, increased sales and strengthened productivity, all while remaining competitive.

Business process

System Administration	
System options	Set up pricing
Define system options	Set up zone structures
Define system defaults	Set up pricing attributes
Maintain codes	Define price guides
Define aggregation levels	
Price strategies	
Define area differentials	
Maintain price strategies	
Price changes	
Create a price change	
Change the status of a price change	
Maintain a price change	
Clearances	
Create a clearance	
Change the status of a clearance	
Maintain a clearance	

Promotions	
Basic promotions	Deal based promotions
Create a promotion event	Create a promotion event
Create a promotion	Create a promotion
Add a component to a promotion	Add a component to a promotion
Create a simple component	Create vendor funding defaults
Create a threshold component	Add funding information to a promotion
Create a buy/get component	



Note: Additional functionality, available with the next release of RPM include calendar management, pricing worksheets, additional pricing strategies, location moves, price changes based on link codes, and candidate rules.

Chapter 2 – Navigating RPM

Overview

This section describes how to navigate in general in RPM. This section provides instructions to:

- Access the workspace
- View the workspace
- Resize elements of the workspace
- Look up field level data
- Search for and filtering records

Procedures


Accessing the workspace

Log in to RPM

How you access Retek Price Management depends on how the application is set up at your location. Contact your system administrator for instructions. Use the exit procedure when you are done using the application.

Exit RPM

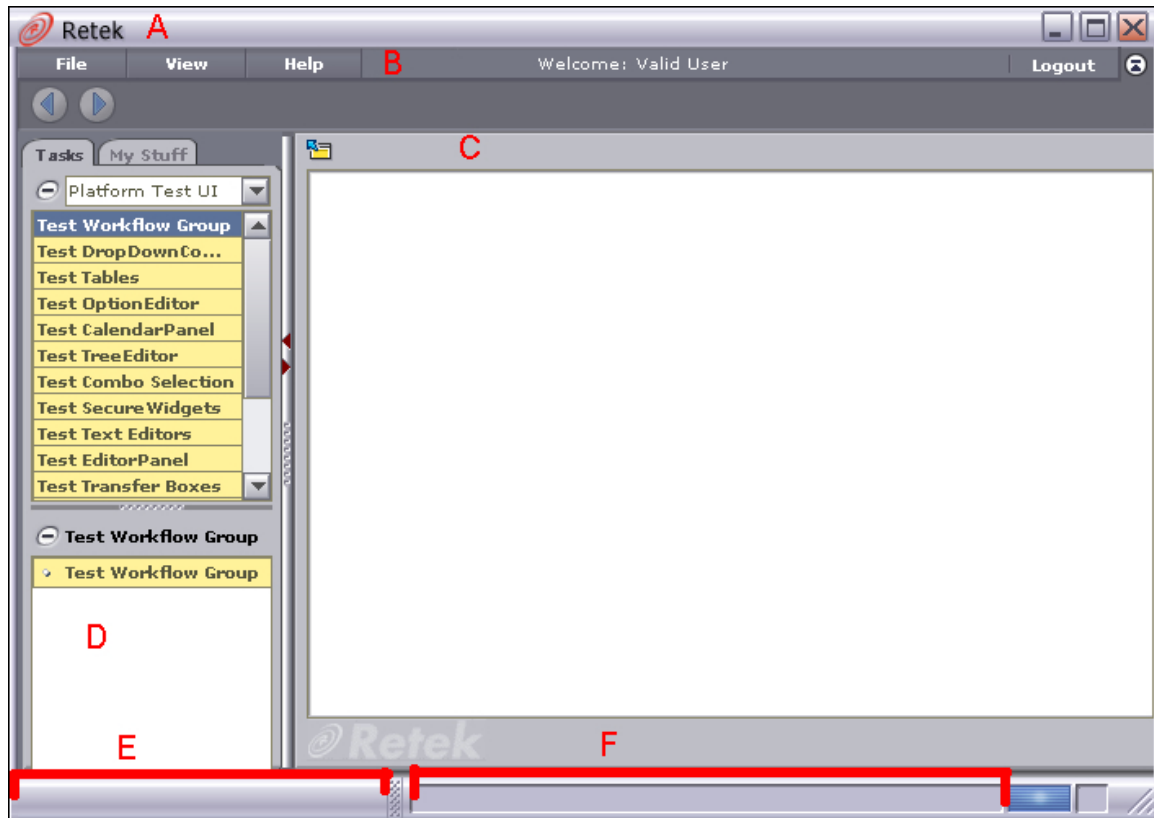
There are a few ways you can log out of and close RPM. You can:

- Click Logout in the global links area of the header.
- Select Close Window from the File menu.
- Select Exit from the File menu.
- Click the close  button on the title bar.

If any tasks are open, you are prompted to confirm your decision to log out.

Viewing the workspace

After logging into RPM, you have access to the application window. The primary elements in the application window are as follows:



The workspace is comprised of all the elements within the application window. You manage the application and perform tasks within the workspace. Many of the elements within the workspace can be minimized, maximized, or manually resized. This allows you to customize the workspace to fit your work habits. Any changes you make are remembered by the application. The next time you log in, the elements appear as you last left them.

Element		Purpose
A	Title bar	Located at the top of the window. The title bar displays the product name. The three buttons at the far right on the title bar allow you to minimize, restore, maximize, and close the application window.
B	Header	Located below the title bar. The header provides access to commands that remain static across all tasks. The menu bar, welcome message, and global links appear here.
C	Workspace	Located next to the task pad and below the toolbar. What appears in the workspace depends on what you select on the task pad. The workspace is where you complete the tasks assigned to you.

Element		Purpose
D	Task pad	Located on the left side of the application window. From top to bottom, you can access an application, a task group, and then a task. When you select a task, the contents of the task are displayed in the workspace.
E	Task bar	Located at the bottom of the window. Task buttons, located on the task bar allow you to switch between open tasks.
F	Status bar	Located at the bottom of the window. The status bar lists the status of a task and gives other information.
	Task	A pane or a group of panes that appear in the workspace, allowing you to work.

Resizing elements of the workspace

The benefits of resizing become apparent as you customize the workspace to fit your work habits. You can hide or minimize elements that do not pertain to the current task. You can show or maximize the elements that are of greater importance.

The RPM window

You can resize the RPM window in order to increase or decrease the amount of space it occupies on your desktop.

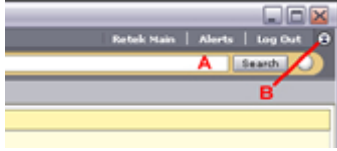
- To manually resize the window, place the cursor over the edge of the window. When the cursor changes to a double arrow, press and hold the left mouse button. Move the cursor until the window is the desired size. Release the left mouse button.



- To minimize the window, click the minimize icon (A).
- To maximize the window, click the maximize icon (B).
- To restore the window to its previous size, click the restore icon (C).
- As an alternative method for resizing the window, right click on the RPM button found on the Microsoft Windows task bar. On the context menu that appears, select Restore, Minimize, or Maximize.

Toolbar

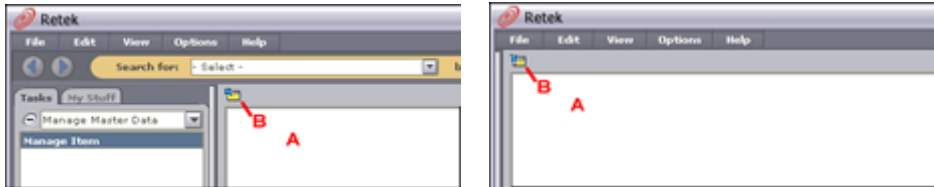
Although the toolbar occupies relatively little space in the window, you can choose to hide it or show it.



- To collapse the toolbar (A), click the expand/collapse toolbar icon (B). The icon is located on the far right side of the header.
- To expand the toolbar, click again on the same icon.

Workspace

The workspace is likely to be the most used element in the application. As such, you may want to maximize its size. Should you need to access the task pad, restore the content area to its original size.

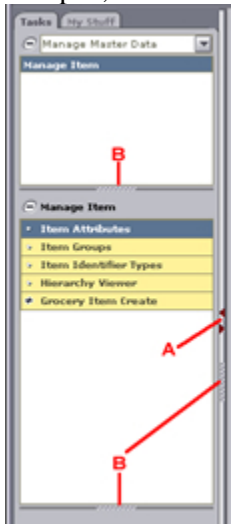


- To expand the workspace (A), click the explode icon (B). The icon is located on the upper left corner of the content area. The content area expands to the width of the window. The task pad and the toolbar disappear.
- To restore the window to its original size, click again on the same icon. The task pad and toolbar reappear.

Task pad

The task pad provides access to the tasks assigned to you. Once you are working on a task, you may want to reduce the size of the task pad. You may want to increase the size of the task pad in order to see the full names of the task. As you increase or decrease the width of the task pad, the width of the workspace is resized proportionally.

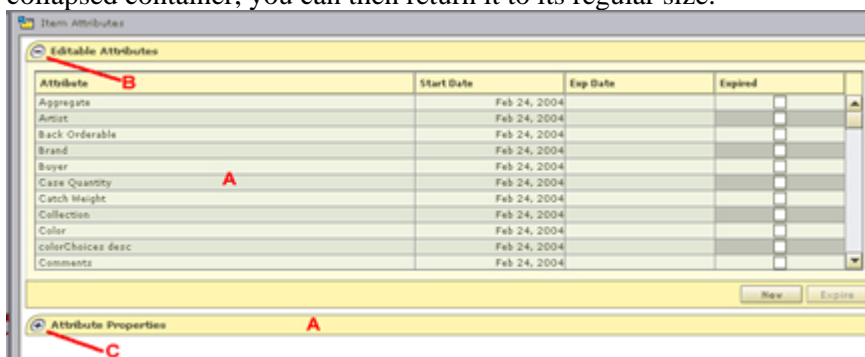
- To maximize the task pad, click the right arrow on the separator bar (A). To minimize the task pad, click the left arrow. Note that the width of the task pad can be one of three sizes:



- maximized to the width of the application window.
 - minimized to where it is no longer visible.
 - restored to its previous size.
- To manually resize the width of the task pad or the length of the work areas within the task pad, place the cursor over the desired resizer (B). When the cursor changes to a left/right (or an up/down) arrow, press and hold the left mouse button. Drag the resizer until the task pad or work area is the desired size. Release the mouse button.

Pane

One or more panes appear in the workspace when you select a task on the task pad. You can collapse a pane so that it does not distract you from the panes you want to work in. Only the title bar of the container is displayed after you collapse it. When you are ready to work in the collapsed container, you can then return it to its regular size.



- To collapse a pane (A), click the collapse icon (B).
- To expand a pane, click the expand icon (C).

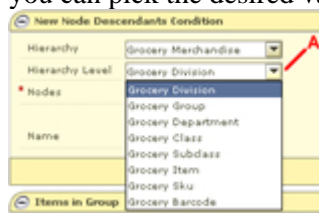
Looking up field level data

The basic method for entering data in a text field is to type the text in the field. Some fields are restricted, however, as to the type of data that may be entered. The options for entering or selecting data depends on the type of data that may be required or permitted in the field. For example, some fields permit only numeric data, while others permit only alphabetic or alphanumeric data. Some fields require a date to be entered in a specific format. Some fields permit only one value, while others permit multiple values.

Calendars, drop-down lists, lists of values, and transfer boxes provide you with access to preformatted, predefined values. Instructions for using these tools are provided below.

Drop-down list

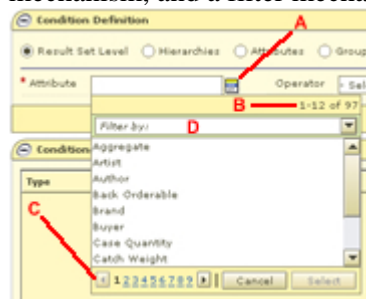
Some fields are restricted to a predefined list of values. You access a drop-down list from which you can pick the desired value.



1. Click on the drop-down arrow (A) next to a field. A list of predefined values appears.
2. Scroll through the list until the desired value appears. Select the value. The field is automatically filled in with the selected value.

List of values

When a drop-down list has more than 12 possible values, you can access them from the list of values (LOV) button. The list of values popup displays the first set of values, a paging mechanism, and a filter mechanism.



1. Click the LOV button next to a text field (A). The list of values popup opens. The number of values displayed on the first page and the total number of values appears on the title bar (B) of the popup.
2. To find a value, use one or a combination of the following methods:
 - Page through the values by clicking on the numbers, or click the right (next) and left (previous) arrows on the footer (C) of the popup. Select the desired value.
 - Enter a partial value in the Filter by text box (D) and press Enter. Select the desired value from the results.
 - Select the down arrow next to the Filter by text box (D) and use the Advanced Filter option. Enter conditions in the Advanced Filter popup and click **OK**.

3. Select the value and click **Select**. The field is automatically filled in with the selected value.

Multi-select lists of value.

Some lists of value allow you to select more than one value. Multi-select allows a user to select multiple rows in a single block by using the Shift and Control keys. The functionality is analogous to the select functionality of other Windows applications.

Select continuous information

1. Click on a row.
2. Press Shift and click on another row to select all the rows in between, inclusively.

Select non-continuous information

1. Click on a row.
2. Control click on rows to select or deselect the individual rows clicked on (depending on whether they are currently selected) while leaving the other selected rows still selected.

Add the values

1. Click the down arrow to add the value to the selected area.
2. Click the up arrow to remove a value from the selected area.

Searching for and filtering records

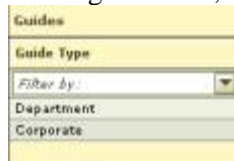
You search for records when none are displayed. By entering search criteria, you indicate which records must be displayed for your use. Filtering, on the other hand, allows you to reduce the number of records (or values) displayed. Again, you enter criteria indicating which of the currently displayed records must remain visible. The unwanted records are hidden from view. In either case, you are restricting the number of records (or values) displayed to a more manageable and useful number.

Filter

Filter records in a table

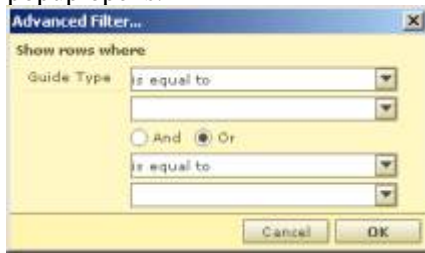
Column-level filtering is available in tables that have drop-down lists.

1. To use a simple filter:
 - a. Enter a partial string in the active cell. For example: Enter D or d to retrieve all records that begin with D, such as Department.



- b. Press the Enter key. The records that match the filter criterion are displayed in the table.
- c. To show all records again, click on the down arrow in the active cell and select Clear Filter.


2. To use the advanced filter tool:
 - a. Click the down arrow in the active cell and select Advanced Filter. The Advanced Filter popup opens.

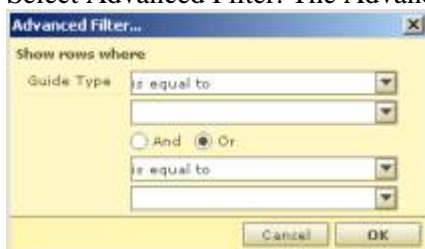


- b. Select a relational operator in the first list box. Then select a value in the second list box.
 - c. If another condition is necessary, select a logical operator (And or Or). Then select the second relational operator and value.
 - d. Click **OK**. The records that match the conditions are displayed in the table.
 - e. To show all records again, click on the down arrow in the active cell and select Clear Filter.
3. To reuse a filter:
 - a. Click the down arrow in the active cell.
 - b. Scroll through the list of recent filters; then select the desired filter.
 - c. To show all records again, click on the down arrow in the active cell and select Clear Filter.

Filter values in a list of values

Filter functionality is available in fields that have a lengthy list of values. A list of values (LOV) button appears to the right of such fields.

1. Click the LOV  button next to a text field. The list of values opens.
2. To use a simple filter:
 - a. Enter a partial string in the Filter by text box.
 - b. Press the Enter key.
3. To use the advanced filter tool:
 - a. Click the down arrow next to the Filter by text box. The filter menu is displayed.
 - b. Select Advanced Filter. The Advanced Filter popup opens.



- c. Select a relational operator in the first list box. Then select a value in the second list box.

- d. If another condition is necessary, select a logical operator (And or Or). Then select the second relational operator and value.
 - e. Click OK. The values that match the conditions are displayed in the list.
- 4. To clear a filter, select Clear Filter on the filter menu.

Chapter 3 – Pricing strategies

Define area differentials

Overview

Area differential pricing allows you to set prices for items at a particular location or group of locations differently than other locations within a zone group. The price differential is based on the rules you define. Area differentials can be used when you create a price change to ensure consistent pricing. Differential pricing cannot be applied to other price changes, such as clearances or promotions.

You first establish a primary area, by defining the merchandise hierarchy and location hierarchy for the primary area. Next, select the locations that fall within the secondary area. Then define how prices for the item will differ in those locations from the prices in the primary area. You can choose to price the item higher or lower by percent, or set the price to the same as the primary area.

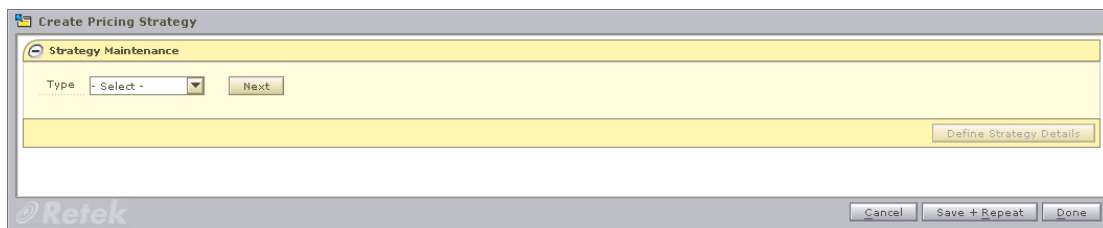
Area differentials are applied when price changes are created manually or directly from the Price Strategy workspaces. If you choose to auto-approve price changes, secondary price changes are conflict check and created in approved status. If conflicts exist, the price change is created in worksheet status. The Change the status of a price change topic provides additional information about status changes and conflict checking.

Finally, you can choose to exclude certain items in the merchandise hierarchy from the secondary area differential prices.

Procedures


Create an area differential

⇒ **Navigate:** From Task Pad, select Price Strategy > Create Price Strategy. The Create Pricing Strategy workspace is displayed.






Create Pricing Strategy workspace

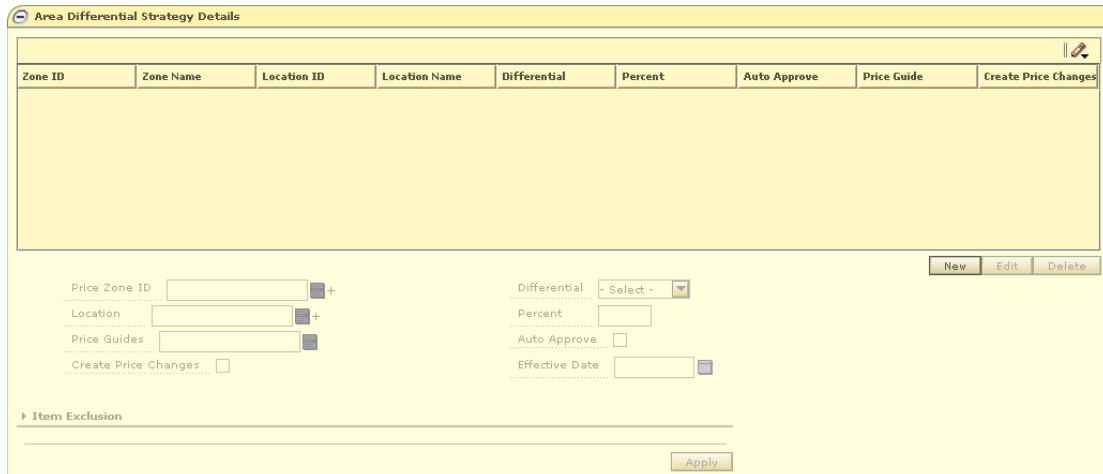
1. In the Type field, select Area Differential.
2. Click **Next**. Additional fields are displayed.

- Enter the ID of the merchandise level you want to apply the area differential to, or click the LOV  button and select the appropriate merchandise level.





Note: You must enter a department. Subsequent merchandise levels are enabled as you add the level above, if the definition of the department in the area differentials area allows it.


- Select the locations that define the primary area:
 - Zone Group:** Enter the ID of the Zone Group that contains the locations you want to add to the price change, or click the LOV  button and select a zone group.
 - Zone:** Enter the ID of the Zone that contains the locations you want to add to the price change, or click the LOV  button and select a zone.
 - Location:** Enter the ID of the location that you want to add to the price change, or click the LOV  button and select a location.
- Click **Define Secondary Areas**. The Area Differential Strategy Details pane is displayed.



Zone ID	Zone Name	Location ID	Location Name	Differential	Percent	Auto Approve	Price Guide	Create Price Changes

Price Zone ID  +

Location  +


Price Guides  +

Create Price Changes ☐




Differential

Percent

Auto Approve ☐

Effective Date 

Area Differential Strategy Details pane

- Click **New** to enable the fields.
- In the Price Zone field, enter the ID of the zone that contains the secondary area, or click the LOV  button and select a zone.
- In the Location field, enter the ID of the location that is the secondary area, or click the LOV  button and select a location.
- In the Price Guides field, enter the ID of the price guide you want to apply to the differential pricing, or click the LOV  button and select a price guide.
- Select the Create Price Changes check box to create price changes on the effective date.



Note: Selecting this check box will create price changes for the item/locations in the secondary area.

11. In the Differential field, select how the price differs from the primary area:
 - **Price Higher:** The items at the specified secondary locations are priced higher by the percentage entered in the Percent field.
 - **Price Lower:** The items at the specified secondary locations are priced lower by the percentage entered in the Percent field.
 - **Price Equal:** The items at the specified secondary locations are priced the same as the items in the primary area.
12. In the Percent field, enter the percent by which the area is different from the base price.
13. Select the Auto Approve check box to indicate that the price changes for the area differential should be created in Approved status.
14. In the Effective Date field, enter the date on which the price change for the area differentials should occur.



Note: This field is only enabled if you selected the Create Price Changes check box.

Exclude items from the area differential



Note: Expand the Item Exclusion section of the Area Differentials pane to complete the procedure.

1. Enter or select criteria ID of the items you want to exclude.
2. Click **Add**. The information is added to the item exclusion table.
3. To remove an item from the item exclusion table:
 - a. Select an item.
 - b. Click **Remove**. The item is removed from the item exclusion table.

Complete the area differential

1. Click **Apply**. Any changes are added to the table
2. Click **Done** to save your changes and close the window.

Maintain price strategies

Overview

After you have created a price strategy, you can maintain the price strategy.

Procedures

Edit a price strategy

⇒ **Navigate:** From Task Pad, select Price Strategy > Maintain Price Strategy. The Maintain Pricing Strategy workspace is displayed.

The screenshot shows the 'Maintain Pricing Strategy' workspace. It features a 'Strategy Maintenance' header and a 'Pricing Strategies List' table. The table has columns for Department, Class, Subclass, Zone Group, Zone, Location, Type, Price Guide, Calendar, and Calendar Status. The first row is highlighted in blue. Below the table are 'Delete' and 'Edit' buttons. At the bottom of the window are 'Cancel', 'Save + Repeat', and 'Done' buttons.

Department	Class	Subclass	Zone Group	Zone	Location	Type	Price Guide	Calendar	Calendar Status
1221: Kitchenw...			Corin's ZG	Z1		Area Differential			None
5000: ALL Fcst...	101: ALL Class	101: ALL Subcl...	Ranjit 001	Ranjit Test Group	Baltimore	Clearance			None
1234: Glassware			ZG-TC0004b	Z1		Clearance			None
1704: *Candida...			ZG-forDev	Z1-USD		Clearance		SH-1	Assigned
1704: *Candida...			ZG-0009	A1		Clearance		Daily Calendar	Assigned
1704: *Candida...			ZG-2WH	Z-WH		Clearance		Daily Calendar	Assigned
1221: Kitchenw...	1000: Utensils	1000: Gadgets	Rick's Teams	Polars	Buffalo	Competitive		Daily Calendar	Assigned
1221: Kitchenw...			1221 Warehouses	Warehouses		Competitive		Corin 10/21	Suspended
1221: Kitchenw...	1000: Utensils	1000: Gadgets	1221 Warehouses	Warehouses		Competitive		Starts 10/23, En...	Assigned
1221: Kitchenw...	1000: Utensils	1000: Gadgets	Mpls and Fargo	Mpls and Fargo		Competitive		Daily Calendar	Assigned
99: SIG Meat			Ranjit 001	Ranjit Test Group	Baltimore	Margin		Daily Calendar	Assigned
111: *Test Dep ...			HL-CAD	HL_CAD		Margin			None
7778: Cost Dept			name	HL_CAD		Margin			None
2345: Small Ap...			DW USD	DW USD		Margin			None
2345: Small Ap...			Ranjit 001	Ranjit Test Group	Edina	Margin			None
7777: Retail Dept			MERCH EXTRA...	My Zone/ 2 Locs		Margin			None
7777: Retail Dept			Ranjit 001	Ranjit Test Group		Margin			None
7777: Retail Dept			Ranjit 001	ranjit test 2		Margin			None
7777: Retail Dept			Ranjit 001	New Zone		Margin			None

Maintain Pricing Strategy workspace

1. From the Price List, select the area differential you want to maintain.
2. Click **Edit**. A second Strategy Maintenance pane is displayed.
3. Select the location you want to update.
4. Click **Edit**. Fields that can be changed are enabled.

Remove a location from the area differential

1. Select the location you want to delete.
2. Click **Delete**. The location is removed from the table

Exclude items from the area differential



Note: Expand the Item Exclusion section of the Area Differentials pane to complete the procedure.

1. Enter or select criteria ID of the items you want to exclude.
2. Click **Add**. The information is added to the item exclusion table.
3. To remove an item from the item exclusion table:
 - a. Select an item.
 - b. Click **Remove**. The item is removed from the item exclusion table.

Complete the area differential

1. Click **Apply**. Any changes are added to the table
2. Click **Done** to save your changes and close the window.

Delete a price strategy

⇒ **Navigate:** From Task Pad, select Price Strategy > Maintain Price Strategy. The Maintain Pricing Strategy workspace is displayed.

1. From the Price List, select the area differential you want to delete.
2. You are prompted to confirm your decision.
3. Click **Yes**.

Chapter 4 – Price changes

Change the status of a price change

Overview

When a price change is added to RPM, it must go through a series of checks before it can be applied to an item/location. Depending on your user role, you may not be able to move the retail price change to the next status. A change to submitted or approved status results in a conflict check. A change to approved status results in the application of area differential strategies for the price change. A price change may be in any of the following statuses:

Status	Definition
Worksheet	The price change has been started, but not reviewed or sent out.
Submitted	The price change has been completed and is pending review. Conflict checking has occurred for the price change.
Approved	The price change has been reviewed and accepted. The price change is communicated to the locations for which the price change is effective.
Executed	The new prices established are effective for the item/location.
Rejected	The price change has been reviewed and declined.

Procedures

- ⇒ **Navigate:** From the Task Pad, select Price Changes > Maintain Price Change. The Maintain Price Changes workspace displayed.

Maintain Price Changes workspace

1. Search for and retrieve the price change you want to maintain. Your results are displayed in the Price Change List pane.

ID	Link Code	Item	Diff ID Descr	Currency	Item Description	Item Level	Diff ID	Location	Location Desc	Location Type	Primary Zone	E
2535		1000		CAD	DOC Item 1	Transaction...		206	HL_CAD			
2510		1000		USD	DOC Item 1	Transaction...		10000000...	Sioux Falls	Store		

Price Change List pane



Note: If you are in the Create Price Change workspace your price changes are displayed in the Price Change List container when you click **Apply**. You do not need to open the Maintain Price Change workspace.

2. Select the price change for which you want to change the status.
 - In the table, select a row.
 - Click **Select All**. All records in the Price Change List pane are selected.
3. In the Action field, select the status to which you want to move the price change.
4. Click **Update**. You are prompted to confirm your decision.

5. Click **Yes**. If conflicts exist, the Conflict Review List window is displayed.
 - a. The current price change is displayed in the upper half of the window. Price changes in conflict are displayed in the lower half of the window.
 - b. Click **Close** to adjust the details of the appropriate price change. The Maintain a price change procedure contains additional information on how to adjust a price change.
6. Click **Done** to save any changes and close the window.

Create a price change

Overview

A price change is the permanent change in the price of an item. You can use the price guides to move the new price to established price points, round the price, or define price internals.

The Create Price Change window allows you to establish the price changes for an item at a location or group of locations. When you open the window, the Price Change List and Price Change Maintenance containers are displayed. After you create your price change in the Price Change Maintenance container, it is displayed in the Price Change List container.

If you select locations with multiple currencies, you can only choose to create a price change by percent or to reset the POS price. Additionally, you cannot create multi-unite pricing across multiple currencies.

Procedures

Create a price change

⇒ **Navigate:** From the Task Pad, select Price Changes > Create Price Change. The Create Price Change workspace is displayed.

The screenshot displays the 'Create Price Change' workspace. It features two main containers: 'Price Change List' and 'Price Change Maintenance'.



Price Change List: This container shows a table with columns: ID, Link Code, Item, Item Description, Item Level, Diff ID, Diff ID Description, Location, Location Description, Location Type, Primary Zone, Exception Ind, Parent ID, and Currency. The table is currently empty.

Price Change Maintenance: This container contains several input fields and sections:

- Type:** Radio buttons for Regular (selected), Vendor Funded, and Link Code.
- Effective Date:** A date picker field.
- Price Change Type:** A dropdown menu set to '- Select -'.
- Change Amount:** A text input field.
- Selling UOM:** A text input field with a dropdown arrow.
- Price Guide:** A text input field.
- Reason Code:** A text input field.
- Multi Unit Pricing:** A checkbox.
- Multi Units:** A text input field.
- Multi Unit Retail:** A text input field.
- Multi Unit UOM:** A text input field with a dropdown arrow.
- Location Selection:** A section with fields for Zone Group, Zone, and Location, each with a dropdown menu and a '+' icon.
- Location Selection Table:** A table with columns: Level, ID, Description, and Location Type. It is currently empty.
- Item Selection:** A section with fields for Department and Class, each with a dropdown menu and a '+' icon.


At the bottom of the workspace, there are buttons for 'Cancel', 'Save + Repeat', and 'Done'.


Create Price Change workspace




1. In the Price Change Maintenance pane, in the Type field, select the type of price change you are creating:
 - **Regular:** The price change is occurring at the retailer's initiative.
 - **Vendor Funded:** The supplier is subsidizing the price change.
2. In the Effective Date field, enter the date the price change is enabled, or click the calendar  button and select a date.
3. In the Price Guide field, enter the ID of the price guide you want to apply to the price change, or click the LOV  button and select a price guide.



Note: The price guide only applies to the items in the same department as the price guide.

4. In the Reason Code field, enter the ID of the reason you are creating the price change, or click the LOV  button and select a reason code.
5. In the Location Selection area, select how you want to add locations to the price change.


 **Note:** You must assign locations before you can indicate the price change information.

 - **Zone Group:** Enter the ID of the Zone Group that contains the locations you want to add to the price change, or click the LOV  button and select a zone group.
 - **Zone:** Enter the ID of the Zone that contains the locations you want to add to the price change, or click the LOV  button and select a zone.
 - **Location:** Enter the ID of the location that you want to add to the price change, or click the LOV  button and select a location.
6. Click **Select**. Locations that meet your criteria are added to the table in the Location Selection area.
7. In the Price Change Type field, select the type of price change that is occurring.



Note: If you selected locations with multiple currencies, you can only choose to create a price change by percent or to reset the POS price.

- **Change By Percent:** A price for an item changed by is a percentage added to or removed from the original price. The percent of change is determined by the percent entered in the Change Amount field.
- **Change By Amount:** A price for an item is changed by an amount added or removed from the original price. The amount of change is determined by the amount entered in the Change Amount field.
- **Fixed Price:** The price for the item will be at a specified retail that will be defined in the change amount field.
- **Reset POS Price:** The item will be recognized on a price change but no change to the retail will occur. When you select, the Change Amount field and Selling UOM field will be disabled.

8. To define the multi unit pricing for a price change:
 - a. Select the Multi Unit Pricing check box.
 - b. In the Multi Units field, enter the number of units that are part of the price change.
 - c. In the Multi Unit Retail field, enter the new price for the items.
 - d. In the Multi Unite UOM field, enter the ID of the unit of measure that applies to the price change, or click the LOV  button and select a unit of measure.
9. In the Change Amount field, enter the amount, percent, or fixed amount the price changes.
 - Enter a positive number (10) to indicate an increase in amount or percent.
 - Enter a negative number (-10) to indicate a decrease in amount or percent.
10. In the Item Selection area, select how you want to add items to the price change.
11. Click **Select**. Items that meet your criteria are added to the table in the Item Selection area.
12. Click **Apply** to add all your changes.
13. Change the status of your price change as appropriate.
14. Click **Done** to save your changes and close the workspace.

Maintain a price change

Overview

After you create a price change, you can maintain different aspects of the price change. You can create exceptions to the items and locations that exist on the price change, you can change the specifics of the price change, and you can copy an existing price change.

The procedures below allow you to navigate and search for price changes through the Maintain Price Change task on the Task Pad; however, you can accomplish these same tasks after you create a price change and the price change is displayed in the Price Change List pane in the Create Price Change workspace.

Procedures

Search for a price change

⇒ **Navigate:** From the Task Pad, select Price Changes > Maintain Price Change. The Maintain Price Changes workspace displayed.

The screenshot shows the 'Maintain Price Changes' workspace with a 'Price change Search' form. The form includes various search criteria fields:

- Type:** Regular (dropdown)
- Effective Date:** [] To [] (date pickers)
- Approved By:** [] (text)
- Approved Date:** [] To [] (date pickers)
- Reason Code:** [] (+) (text)
- Deal ID:** [] (+) (text)
- Deal Detail ID:** [] (+) (text)
- Status:** - Select - (dropdown)
- Created By:** [] (text)
- Create Date:** [] To [] (date pickers)
- Price Guide:** [] (+) (text)
- Department:** [] (+) (text)
- Class:** [] (+) (text)
- Subclass:** [] (+) (text)
- Item Type:** Item (dropdown)
- Item Level:** Transaction Level Item (dropdown) ☐ Search On This Level Only
- Diff Type:** - Select - (dropdown)
- Item:** [] (+) (text)
- Diff:** [] (+) (text)
- Zone Group:** [] (+) (text)
- Zone:** [] (+) (text)
- Location:** [] (+) (text)
- ☐ Search On This Level Only
- Market Basket Code:** [] (+) (text)
- Link Code:** [] (+) (text)

At the bottom right of the form are 'Clear' and 'Search' buttons. The Retek logo is visible in the bottom left corner of the workspace.

Maintain Price Changes workspace

1. Enter criteria as necessary to restrict the search to the price changes you want to maintain.

- Click **Search**. Your results are displayed in the Price Change List pane.

ID	Link Code	Item	Diff ID Descri	Currency	Item Description	Item Level	Diff ID	Location	Location Desc	Location Type	Primary Zone	E
2535		1000		CAD	DOC Item 1	Transaction...		206	HL_CAD			
2510		1000		USD	DOC Item 1	Transaction...		10000000...	Sioux Falls	Store		

Price Change List pane

Maintain a price change

- ⇒ **Navigate:** From the Task Pad, select Price Changes > Maintain Price Change. The Maintain Price Changes workspace displayed.

Maintain Price Changes workspace

- Search for and retrieve the price change you want to maintain. Your results are displayed in the Price Change List pane.

ID	Link Code	Item	Diff ID Descri	Currency	Item Description	Item Level	Diff ID	Location	Location Desc	Location Type	Primary Zone	E
2535		1000		CAD	DOC Item 1	Transaction...		206	HL_CAD			
2510		1000		USD	DOC Item 1	Transaction...		10000000...	Sioux Falls	Store		

Price Change List pane

- From the list of results, select the price change you want to maintain. The price change details are displayed in the Price Change Maintenance pane is displayed.

Price Change Maintenance

Type: ☒ Regular ☐ Vendor Funded ☐ Link Code

* Effective Date: 10/31/2004

* Price Change Type: Change By Percent

Change Amount: 1.0000

Selling UOM:

Price Guide:

* Reason Code: 1

Multi Unit Pricing: ☐

Multi Units:

Multi Unit Retail:

Multi Unit UOM:

Location Selection

Clear Delete Select

Level	ID	Description	Location Type
Location	1000000004	Sioux Falls	Store

Item Selection

Clear Delete Select

Level	ID	Diff ID	Description
Item	1000		DOC Item 1

Apply

Price Change Maintenance pane

- If necessary, change the status of the price change to Worksheet.
- Edit the enabled fields as necessary.



Note: You cannot change the items and locations on a price change.

- Click **Apply** to add all any changes.
- Click **Done** to save any changes and close the window.

Copy a price change

⇒ **Navigate:** From the Task Pad, select Price Changes > Maintain Price Change. The Maintain Price Changes workspace displayed.

Maintain Price Changes

Price Change Search

Type: Regular

Effective Date: [] To: []

Approved By: []

Approved Date: [] To: []

Reason Code: []

Deal ID: []

Deal Detail ID: []

Department: []

Class: []

Subclass: []

Item Type: Item

Item Level: Transaction Level Item ☐ Search On This Level Only

Diff Type: - Select -

Item: []

Diff: []

Status: - Select -

Created By: []

Create Date: [] To: []

Price Guide: []

Zone Group: []

Zone: []

Location: []

☐ Search On This Level Only

Market Basket Code: []

Link Code: []

Clear Search

Cancel

Maintain Price Changes workspace

1. Search for and retrieve the price change you want to copy. Your results are displayed in the Price Change List pane.

Price Change List

ID	Link Code	Item	Diff ID	Description	Currency	Item Description	Item Level	Diff ID	Location	Location Desc	Location Type	Primary Zone	E
2535		1000			CAD	DOC Item 1	Transaction...		206	HL_CAD			
2510		1000			USD	DOC Item 1	Transaction...		10000000...	Sioux Falls	Store		

Status: Executed Action: - Select - Update

Delete New Copy Loc Exception Tran Exception Conflict Check Select All

Price Change List pane

2. From the list of results, select the price change you want to copy.

- Click **Copy**. The price change details are displayed in the Price Change Maintenance pane.

Price Change Maintenance

Type: ☒ Regular ☐ Vendor Funded ☐ Link Code

* Effective Date: 10/31/2004

* Price Change Type: Change By Percent

Change Amount: 1.0000

Selling UOM:

Price Guide:

* Reason Code: 1

Multi Unit Pricing: ☐

Multi Units:

Multi Unit Retail:

Multi Unit UOM:

Location Selection

Clear Delete Select

Level	ID	Description	Location Type
Location	1000000004	Sioux Falls	Store

Item Selection

Clear Delete Select

Level	ID	Diff ID	Description
Item	1000		DOC Item 1

Apply

Price Change Maintenance pane

- Edit the enabled fields as necessary.
- Click **Apply** to add all any changes.
- Click **Done** to save any changes and close the window.

Delete a price change

- ⇒ **Navigate:** From the Task Pad, select Price Changes > Maintain Price Change. The Maintain Price Changes workspace displayed.

The screenshot shows the 'Maintain Price Changes' workspace with a 'Price Change Search' form. The form includes various search criteria such as Type (Regular), Effective Date, Approved By, Reason Code, Deal ID, Deal Detail ID, Department, Class, Subclass, Item Type (Item), Item Level (Transaction Level Item), Diff Type, Item, Diff, Status, Created By, Create Date, Price Guide, Zone Group, Zone, Location, Market Basket Code, and Link Code. There are 'Clear' and 'Search' buttons at the bottom right of the form area.

Maintain Price Changes workspace

1. Search for and retrieve the price change you want to delete. Your results are displayed in the Price Change List pane.

The screenshot shows the 'Price Change List' pane with a table of price changes. The table has columns for ID, Link Code, Item, Diff ID, Description, Currency, Item Description, Item Level, Diff ID, Location, Location Desc, Location Type, Primary Zone, and E. Two rows are visible: one for ID 2535 (CAD, DOC Item 1, Transaction...) and one for ID 2510 (USD, DOC Item 1, Transaction...). Below the table is a status bar with 'Status' set to 'Executed' and an 'Action' dropdown set to '- Select -'. There are also 'Update', 'Delete', 'New', 'Copy', 'Loc Exception', 'Tran Exception', 'Conflict Check', and 'Select All' buttons.

ID	Link Code	Item	Diff ID	Description	Currency	Item Description	Item Level	Diff ID	Location	Location Desc	Location Type	Primary Zone	E
2535		1000			CAD	DOC Item 1	Transaction...		206	HL_CAD			
2510		1000			USD	DOC Item 1	Transaction...		10000000...	Sioux Falls	Store		

Price Change List pane

2. From the list of results, select the price change you want to delete.
3. Click **Delete**. You are prompted to confirm your decision.
4. Click **Yes**. The price change is deleted.
5. Click **Done** to close the window.

Check for conflicting price changes

⇒ **Navigate:** From the Task Pad, select Price Changes > Maintain Price Change. The Maintain Price Changes workspace displayed.

Maintain Price Changes workspace

1. Search for and retrieve the price change you want to check. Your results are displayed in the Price Change List pane.

ID	Link Code	Item	Diff ID Descri	Currency	Item Description	Item Level	Diff ID	Location	Location Desc	Location Type	Primary Zone	E
2535		1000		CAD	DOC Item 1	Transaction...		206	HL_CAD			
2510		1000		USD	DOC Item 1	Transaction...		100000000...	Sioux Falls	Store		

Price Change List pane

2. From the list of results, select the price change you want to check.
3. Click **Conflict Check**.
 - If no conflicts exist, click **OK**.
 - If conflicts exist, you must adjust the details of your price change before you can move the price change to the next status.
4. Click **Done** to save any changes and close the window.

Create a location exception

⇒ **Navigate:** From the Task Pad, select Price Changes > Maintain Price Change. The Maintain Price Changes workspace displayed.

Maintain Price Changes

Price Change Search

Type: Regular

Effective Date: [] To: []

Approved By: []

Approved Date: [] To: []

Reason Code: []

Deal ID: []

Deal Detail ID: []

Status: - Select -

Created By: []

Create Date: [] To: []

Price Guide: []

Department: []

Class: []

Subclass: []

Item Type: Item

Item Level: Transaction Level Item ☐ Search On This Level Only

Diff Type: - Select -

Item: []

Diff: []

Zone Group: []

Zone: []

Location: []

☐ Search On This Level Only

Market Basket Code: []

Link Code: []

Clear Search

Cancel

Maintain Price Changes workspace

1. Search for and retrieve the price change for which you want to create location exceptions
Your results are displayed in the Price Change List pane.

Price Change List

ID	Link Code	Item	Diff ID	Currency	Item Description	Item Level	Diff ID	Location	Location Desc	Location Type	Primary Zone	E
2535		1000		CAD	DOC Item 1	Transaction...		206	HL_CAD			
2510		1000		USD	DOC Item 1	Transaction...		10000000...	Sioux Falls	Store		

Status: Executed Action: - Select - Update

Delete New Copy Loc Exception Tran Exception Conflict Check Select All

Price Change List pane



Note: Location exceptions can only be created for Zone Level price changes

2. From the list of results, select the price change.

- Click **Location Exceptions**. The locations selection area of the Price Change Maintenance pane is enabled.

Price Change Maintenance

Type: ☒ Regular ☐ Vendor Funded ☐ Link Code

* Effective Date: 10/31/2004

* Price Change Type: Change By Percent

Change Amount: 1.0000

Selling UOM:

Price Guide:

* Reason Code: 1

Multi Unit Pricing: ☐

Multi Units:

Multi Unit Retail:

Multi Unit UOM:

Location Selection

Clear Delete Select

Level	ID	Description	Location Type
Location	1000000004	Sioux Falls	Store


Item Selection

Clear Delete Select

Level	ID	Diff ID	Description
Item	1000		DOC Item 1

Apply

Price Change Maintenance pane

- In the Location field, enter the ID of the location where items are different than the rest of the locations on the price change, or click the LOV  button and select a location.
- In the enable price change fields, enter information about the price change for the item/location.
- Click **Apply** to add any changes.
- Click **Done** to save any changes and close the window.

Create item exceptions at the transaction level

⇒ **Navigate:** From the Task Pad, select Price Changes > Maintain Price Change. The Maintain Price Changes workspace displayed.

Maintain Price Changes workspace

1. Search for and retrieve the price change for which you want to create item exceptions Your results are displayed in the Price Change List pane.

Price Change List pane



Note: Item exceptions at the transaction level can occur only when the price change was created at the item parent level.

2. From the list of results, select the price change.

- Click **Tran Exceptions**. The item selection area of the Price Change Maintenance pane is enabled.

Price Change Maintenance

Type: ☒ Regular ☐ Vendor Funded ☐ Link Code

* Effective Date: 10/31/2004

* Price Change Type: Change By Percent

Change Amount: 1.0000

Selling UOM:

Price Guide:

* Reason Code: 1

Multi Unit Pricing: ☐

Multi Units:

Multi Unit Retail:

Multi Unit UOM:

Location Selection

Clear Delete Select

Level	ID	Description	Location Type
Location	1000000004	Sioux Falls	Store


Item Selection

Clear Delete Select

Level	ID	Diff ID	Description
Item	1000		DOC Item 1

Apply

Price Change Maintenance pane

- In the Item field, enter the ID of the item for which items are different than the rest of the locations on the price change, or click the LOV  button and select a location.
- In the enable price change fields, enter information about the price change for the item/location.
- Click **Apply** to add any changes.
- Click **Done** to save any changes and close the window.

Chapter 5 – Clearances

Change the status of a clearance

Overview

When a clearance is added to RPM, it must go through a series of checks before it can be applied to an item/location. Depending on your user role, you may not be able to move the clearance to the next status. A clearance may be in any of the following statuses:

Status	Definition
Worksheet	The clearance has been started, but not reviewed or sent out.
Submitted	The clearance has been completed and is pending review. Conflict checking has occurred for the price change.
Approved	The clearance has been reviewed and accepted. The clearance is communicated to the locations for which the clearance is effective.
Executed	The clearance prices established are effective for the item/location.
Rejected	The clearance has been reviewed and declined.

Procedures

- ⇒ **Navigate:** From the Task Pad, select Clearances > Maintain Clearances. The Maintain Clearances workspace displayed.

Maintain Clearances workspace

1. Search for and retrieve the clearance you want to maintain. Your results are displayed in the Clearance List pane.

ID	Item	Item Description	Item Level	Diff ID	Diff ID Description	Location	Location Description	Location Type	Primary Zone	Exception Ind	Parent ID	Current Unit	Currency
697	1000	DOC Item 1	Transaction...			283	dv test 27						

Clearance List pane



Note: If you are in the Create Clearance workspace, your price changes are displayed in the Price Change List container when you click **Apply**. You do not need to open the Maintain Price Change workspace.

2. Select the price change for which you want to change the status.
 - In the table, select a row.
 - Click **Select All**. All records in the Clearance List pane are selected.
3. In the Action field, select the status to which you want to move the price change.

4. Click **Update**. You are prompted to confirm your decision.
5. Click **Yes**. If conflicts exist, the Conflict Review List window is displayed.
 - a. The current price change is displayed in the upper half of the window. Price changes in conflict are displayed in the lower half of the window.
 - b. Click **Close** to adjust the details of the appropriate price change. The Maintain a price change procedure contains additional information on how to adjust a price change.
6. Click **Done** to save any changes and close the window.

Create a clearance

Overview

A clearance is designed to move out of date and slow selling merchandise out of a store. A clearance is considered a permanent price change, and inventory is consequently revalued. Once the reset date for a clearance has passed, the item's price and inventory value is returned to the regular price.

Procedures

⇒ **Navigate:** From the Task Pad, select Clearances > Create Clearance. The Create Clearance workspace is displayed.

Create Clearance

Clearance List

ID	Item	Item Description	Item Level	Diff ID	Diff ID Description	Location	Location Description	Location Type	Primary Zone	Exception Ind	Parent ID	Current Unit	Cu
----	------	------------------	------------	---------	---------------------	----------	----------------------	---------------	--------------	---------------	-----------	--------------	----

Status: Action: Update

Delete New Copy Loc Exception Tran Exception Conflict Check Select All

Clearance Maintenance

Type: ☒ Regular ☐ Vendor Funded

* Effective Date:

* Price Change Type:

Change Amount:

Price Guide:

* Reason Code:

Out Of Stock Date:

Reset Date:

Earliest Reset Date:

Latest Reset Date:

Location Selection

Zone Group:

Zone:

Location:

Clear Delete Select

Location Selection

Level	ID	Description	Location Type
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Item Selection

Department:


Clear

Retek

Cancel Save + Repeat Done



Create Clearance workspace

- In the Clearance Maintenance pane, in the Type field, select the type of clearance you are creating:
 - Regular:** The clearance is occurring at the retailer's initiative.
 - Vendor Funded:** The supplier is subsidizing the clearance.
- In the Effective Date field, enter the date the clearance is enabled, or click the calendar button and select a date.

3. In the Price Guide field, enter the ID of the price guide you want to apply to the clearance, or click the LOV  button and select a price guide.




Note: The price guide only applies to the items in the same department as the price guide.

4. In the Reason Code field, enter the ID of the reason you are creating the clearance, or click the LOV  button and select a reason code.
5. In the Out of Stock Date field, enter the date you expect the inventory to be consumed, or click the calendar  button and select a date.



Note: Depending on your system settings the date may default, and you do not have to enter the out of stock date.

6. In the Reset Date field, enter the date the price of the item returns to regular price, or click the calendar  button and select a date.






Note: Depending on your system settings the date may default, and you do not have to enter the out of stock date.

7. In the Location Selection area, select how you want to add locations to the clearance.



Note: You must assign locations before you can indicate the clearance information.

- **Zone Group:** Enter the ID of the Zone Group that contains the locations you want to add to the clearance, or click the LOV  button and select a zone group.
- **Zone:** Enter the ID of the Zone that contains the locations you want to add to the clearance, or click the LOV  button and select a zone.
- **Location:** Enter the ID of the location that you want to add to the clearance, or click the LOV  button and select a location.

8. Click **Select**. Locations that meet your criteria are added to the table in the Location Selection area.

9. In the Price Change Type field, select the type of clearance that is occurring.



Note: If you selected locations with multiple currencies, you can only choose to create a clearance by percent.

- **Change By Percent:** A price for an item changed by is a percentage added to or removed from the original price. The percent of change is determined by the percent entered in the Change Amount field.
- **Change By Amount:** A price for an item is changed by an amount added or removed from the original price. The amount of change is determined by the amount entered in the Change Amount field.
- **Fixed Price:** The price for the item will be at a specified retail that will be defined in the change amount field.

10. In the Change Amount field, enter the amount, percent, or fixed amount the price changes.



Note: There is no need to enter a negative sign before the number entered in the Change Amount field. A clearance can only exist as a decrease in price.

11. In the Item Selection area, select how you want to add items to the price change.

12. Click **Select**. Items that meet your criteria are added to the table in the Item Selection area.

13. Click **Apply** to add any changes.

14. Change the status of your price change as appropriate.

15. Click **Done** to save any changes and close the workspace.

Maintain a clearance

Overview

After you create a clearance, you can maintain different aspects of the clearance. You can create exceptions to the items and locations that exist on the clearance, you can change the specifics of the clearance and you can copy an existing clearance.

The procedures below allow you to navigate and search for clearances through the Maintain Clearances task on the Task Pad; however, you can accomplish these same tasks after you create a clearance and the clearance is displayed in the Clearance List pane in the Create Clearance workspace.

Procedures

Search for a clearance

⇒ **Navigate:** From the Task Pad, select Clearances > Maintain Clearances. The Maintain Clearances workspace displayed.

The screenshot shows the 'Maintain Clearances' workspace with a 'Clearance Search' form. The form is organized into two main columns of search criteria. The left column includes fields for Type (set to 'Regular'), Effective Date (with a 'To' field), Approved By, Approved Date (with a 'To' field), Reason Code, Deal ID, Deal Detail ID, Department, Class, Subclass, Item Type (set to 'Item'), Item Level (set to 'Transaction Level Item'), Diff Type (set to '- Select -'), Item, and Diff. The right column includes fields for Status (set to '- Select -'), Created By, Create Date (with a 'To' field), Price Guide, Out Of Stock Date (with a 'To' field), Reset Date (with a 'To' field), Zone Group, Zone, Location, and Market Basket Code. There are also checkboxes for 'Search On This Level Only' and 'Search On This Level Only'. At the bottom right of the form are 'Clear' and 'Search' buttons. The Retek logo is visible in the bottom left corner of the workspace.

Maintain Clearances workspace

1. Enter criteria as necessary to restrict the search to the price changes you want to maintain.

- Click **Search**. Your results are displayed in the Clearance List pane.

The screenshot shows the 'Clearance List' pane. It contains a table with the following columns: ID, Item, Item Description, Item Level, Diff ID, Diff ID Description, Location, Location Description, Location Type, Primary Zone, Exception Ind, Parent ID, Current Unit, and Currency. The first row of data has the following values: ID: 697, Item: 1000, Item Description: DOC Item 1, Item Level: Transaction..., Diff ID: 283, Diff ID Description: dv test 27, Location: 283, Location Description: dv test 27, Location Type: Primary Zone, Exception Ind: , Parent ID: , Current Unit: \$4, and Currency: . Below the table, there is a status bar with 'Status' set to 'Worksheet' and 'Action' set to '- Select -'. At the bottom, there are buttons for 'Delete', 'New', 'Copy', 'Loc Exception', 'Tran Exception', 'Conflict Check', and 'Select All'.

Clearance List pane

Maintain a clearance

- ⇒ **Navigate:** From the Task Pad, select Clearances > Maintain Clearances. The Maintain Clearances workspace displayed.

The screenshot shows the 'Maintain Clearances' workspace. It contains a 'Clearance Search' form with various search criteria. The 'Type' is set to 'Regular'. The 'Effective Date' and 'Approved Date' are both set to 'To' with a calendar icon. The 'Status' is set to '- Select -'. The 'Created By' is set to 'Created By'. The 'Create Date' is set to 'To' with a calendar icon. The 'Price Guide' is set to 'To' with a calendar icon. The 'Out Of Stock Date' is set to 'To' with a calendar icon. The 'Reset Date' is set to 'To' with a calendar icon. The 'Department' is set to 'Department' with a '+' icon. The 'Class' is set to 'Class' with a '+' icon. The 'Subclass' is set to 'Subclass' with a '+' icon. The 'Item Type' is set to 'Item'. The 'Item Level' is set to 'Transaction Level Item' with a checkbox for 'Search On This Level Only'. The 'Diff Type' is set to '- Select -'. The 'Item' is set to 'Item' with a '+' icon. The 'Diff' is set to 'Diff' with a '+' icon. The 'Zone Group' is set to 'Zone Group' with a '+' icon. The 'Zone' is set to 'Zone' with a '+' icon. The 'Location' is set to 'Location' with a '+' icon. The 'Market Basket Code' is set to 'Market Basket Code' with a '+' icon. The 'Search On This Level Only' checkbox is unchecked. At the bottom right, there are 'Clear' and 'Search' buttons. At the bottom left, there is a 'Cancel' button.

Maintain Clearances workspace

- Search for and retrieve the clearance you want to maintain. Your results are displayed in the Clearance List pane.

The screenshot shows the 'Clearance List' pane. It contains a table with the following columns: ID, Item, Item Description, Item Level, Diff ID, Diff ID Description, Location, Location Description, Location Type, Primary Zone, Exception Ind, Parent ID, Current Unit, and Currency. The first row of data has the following values: ID: 697, Item: 1000, Item Description: DOC Item 1, Item Level: Transaction..., Diff ID: 283, Diff ID Description: dv test 27, Location: 283, Location Description: dv test 27, Location Type: Primary Zone, Exception Ind: , Parent ID: , Current Unit: \$4, and Currency: . Below the table, there is a status bar with 'Status' set to 'Worksheet' and 'Action' set to '- Select -'. At the bottom, there are buttons for 'Delete', 'New', 'Copy', 'Loc Exception', 'Tran Exception', 'Conflict Check', and 'Select All'.

Clearance List pane

- From the list of results, select the clearance you want to maintain. The clearance details are displayed in the Clearance Maintenance pane is displayed.

Clearance Maintenance

Type: ☒ Regular ☐ Vendor Funded

* Effective Date: 10/01/2004

* Price Change Type: Change By Amount
Change Amount: 2.00

Price Guide:

* Reason Code: 5-2 Clearance Reas...

Out Of Stock Date:

Reset Date: 10/12/2004

Earliest Reset Date: 10-12-2004

Latest Reset Date: 10-12-2004

► Location Selection

Clear Delete Select

Location Selection

Level	ID	Description	Location Type
Zone	30	Z1-USD	

► Item Selection

Clear Delete Select

Item Selection

Level	ID	Diff ID	Description
Item	12342		SH-Item for dev:32 Waist X32 Inseam

Apply

Clearance Maintenance pane

3. If necessary, change the status of the price change to Worksheet.
4. Edit the enabled fields as necessary.



Note: You cannot change the items and locations on a clearance.

5. Click **Apply** to add all any changes.
6. Click **Done** to save any changes and close the window.

Copy a clearance

⇒ **Navigate:** From the Task Pad, select Clearances > Maintain Clearances. The Maintain Clearances workspace displayed.

The screenshot shows the 'Maintain Clearances' workspace with a 'Clearance Search' form. The form includes various search criteria such as Type (Regular), Effective Date, Approved By, Approved Date, Reason Code, Deal ID, Deal Detail ID, Department, Class, Subclass, Item Type (Item), Item Level (Transaction Level Item), Diff Type (- Select -), Item, Diff, Status (- Select -), Created By, Create Date, Price Guide, Out Of Stock Date, Reset Date, Zone Group, Zone, Location, Market Basket Code, and a checkbox for 'Search On This Level Only'. There are 'Clear', 'Search', and 'Cancel' buttons at the bottom right.

Maintain Clearances workspace

1. Search for and retrieve the clearance you want to Copy. Your results are displayed in the Clearance List pane.

The screenshot shows the 'Clearance List' pane with a table of clearance results. The table has columns for ID, Item, Item Description, Item Level, Diff ID, Diff ID Description, Location, Location Description, Location Type, Primary Zone, Exception Ind, Parent ID, Current Unit, and Currency. A single row is visible with ID 697, Item 1000, Item Description DOC Item 1, Item Level Transaction..., Diff ID 283, Diff ID Description dv test 27, Location 283, Location Description dv test 27, Location Type Primary Zone, Exception Ind, Parent ID, Current Unit \$4, and Currency.

ID	Item	Item Description	Item Level	Diff ID	Diff ID Description	Location	Location Description	Location Type	Primary Zone	Exception Ind	Parent ID	Current Unit	Currency
697	1000	DOC Item 1	Transaction...			283	dv test 27		Primary Zone			\$4	

Below the table, there are buttons for 'Delete', 'New', 'Copy', 'Loc Exception', 'Tran Exception', 'Conflict Check', and 'Select All'. There is also a 'Status' dropdown set to 'Worksheet' and an 'Action' dropdown set to '- Select -'.

Clearance List pane

2. From the list of results, select the clearance you want to copy.
3. Click **Copy**. The clearance details are displayed in the the Clearance Maintenance pane.

Clearance Maintenance

Type: ☒ Regular ☐ Vendor Funded

* Effective Date: 10/01/2004

* Price Change Type: Change By Amount
Change Amount: 2.00

Price Guide:

* Reason Code: 5-2

Out Of Stock Date:

Reset Date: 10/12/2004

Earliest Reset Date: 10-12-2004

Latest Reset Date: 10-12-2004

► Location Selection

Clear Delete Select

Level	ID	Description	Location Type
Zone	30	Z1-USD	

► Item Selection

Clear Delete Select

Level	ID	Diff ID	Description
Item	12342		SH-Item for dev:32 Waist X32 Inseam

Apply

Clearance Maintenance pane

4. Edit the enabled fields as necessary.
5. Click **Apply** to add all any changes.
6. Click **Done** to save any changes and close the window.

Delete a clearance

⇒ **Navigate:** From the Task Pad, select Clearances > Maintain Clearances. The Maintain Clearances workspace displayed.

Maintain Clearances

Clearance Search

Type: Regular

Effective Date: To:

Approved By:

Approved Date: To:

Reason Code:

Deal ID:

Deal Detail ID:

Status: - Select -

Created By:

Create Date: To:

Price Guide:

Out Of Stock Date: To:

Reset Date: To:

Department:

Class:

Subclass:

Item Type: Item

Item Level: Transaction Level Item ☐ Search On This Level Only

Diff Type: - Select -

Item:

Diff:

Zone Group:

Zone:

Location:

☐ Search On This Level Only

Market Basket Code:

Clear Search

Retek

Cancel

Maintain Clearances workspace

1. Search for and retrieve the clearance you want to delete. Your results are displayed in the Clearance List pane.

The screenshot shows the 'Clearance List' window. It features a table with the following columns: ID, Item, Item Description, Item Level, Diff ID, Diff ID Description, Location, Location Description, Location Type, Primary Zone, Exception Ind, Parent ID, Current Unit, and Current Price. A single row of data is visible with the following values: ID: 697, Item: 1000, Item Description: DOC Item 1, Item Level: Transaction..., Diff ID: 283, Diff ID Description: dw test 27, Location: , Location Description: , Location Type: , Primary Zone: , Exception Ind: , Parent ID: , Current Unit: \$4, and Current Price: . Below the table, there is a status bar with 'Status' set to 'Worksheet' and 'Action' set to '- Select -'. At the bottom, there are several buttons: 'Delete', 'New', 'Copy', 'Loc Exception', 'Tran Exception', 'Conflict Check', and 'Select All'.

Clearance List pane

2. From the list of results, select the clearance you want to delete.
3. Click **Delete**. You are prompted to confirm your decision.
4. Click **Yes**. The price change is deleted.
5. Click **Done** to close the window.

Check for conflicting clearance

- ⇒ **Navigate:** From the Task Pad, select Clearances > Maintain Clearances. The Maintain Clearances workspace displayed.

The screenshot shows the 'Maintain Clearances' workspace. It contains a 'Clearance Search' form with the following fields and options:

- Type:** Regular (dropdown)
- Effective Date:** [] To [] (date pickers)
- Approved By:** [] (text field)
- Approved Date:** [] To [] (date pickers)
- Reason Code:** [] (+ icon)
- Deal ID:** [] (+ icon)
- Deal Detail ID:** [] (+ icon)
- Department:** [] (+ icon)
- Class:** [] (+ icon)
- Subclass:** [] (+ icon)
- Item Type:** Item (dropdown)
- Item Level:** Transaction Level Item (dropdown) [] Search On This Level Only (checkbox)
- Diff Type:** - Select - (dropdown)
- Item:** [] (+ icon)
- Diff:** [] (+ icon)
- Status:** - Select - (dropdown)
- Created By:** [] (text field)
- Create Date:** [] To [] (date pickers)
- Price Guide:** [] (+ icon)
- Out Of Stock Date:** [] To [] (date pickers)
- Reset Date:** [] To [] (date pickers)
- Zone Group:** [] (+ icon)
- Zone:** [] (+ icon)
- Location:** [] (+ icon)
- Search On This Level Only:** [] (checkbox)
- Market Basket Code:** [] (+ icon)

 At the bottom right of the form are 'Clear' and 'Search' buttons. The Retek logo is visible in the bottom left corner, and a 'Cancel' button is in the bottom right corner.

Maintain Clearances workspace

1. Search for and retrieve the clearance you want to maintain. Your results are displayed in the Clearance List pane.

ID	Item	Item Description	Item Level	Diff ID	Diff ID Description	Location	Location Description	Location Type	Primary Zone	Exception Ind	Parent ID	Current Unit	Currency
697	1000	DOC Item 1	Transaction...	283	dw test 27								\$4

Clearance List pane

2. From the list of results, select the clearance you want to check.
3. Click **Conflict Check**.
 - If no conflicts exist, click **OK**.
 - If conflicts exist, you must adjust the details of your clearance before you can move the price change to the next status.
4. Click **Done** to save any changes and close the window.

Create a location exception

⇒ **Navigate:** From the Task Pad, select Clearances > Maintain Clearances. The Maintain Clearances workspace displayed.

Maintain Clearances workspace

1. Search for and retrieve the clearance for which you want to create the location exception. Your results are displayed in the Clearance List pane.

ID	Item	Item Description	Item Level	Diff ID	Diff ID Description	Location	Location Description	Location Type	Primary Zone	Exception Ind	Parent ID	Current Unit	Current Price
697	1000	DOC Item 1	Transaction...	283	dv test 27							\$4	\$4

Clearance List pane



Note: Location exceptions can only be created for Zone Level price changes

2. From the list of results, select the clearance.
3. Click **Location Exceptions**. The locations selection area of the Clearance Maintenance pane is enabled.

Type: ☒ Regular ☐ Vendor Funded
 * Effective Date: 10/01/2004
 * Price Change Type: Change By Amount
 Change Amount: 2.00
 Price Guide:
 * Reason Code: 5-2
 Out Of Stock Date:
 Reset Date: 10/12/2004
 Earliest Reset Date: 10-12-2004
 Latest Reset Date: 10-12-2004

Location Selection

Level	ID	Description	Location Type
Zone	30	Z1-USD	

Item Selection

Level	ID	Diff ID	Description
Item	12342		SH-Item for dev:32 Waist X32 Inseam

Apply

Clearance Maintenance pane

4. In the Location field, enter the ID of the location where items are different than the rest of the locations on the price change, or click the LOV button and select a location.
5. In the enable price change fields, enter information about the price change for the item/location.
6. Click **Apply** to add any changes.
7. Click **Done** to save any changes and close the window.

Create item exceptions at the transaction level

⇒ **Navigate:** From the Task Pad, select Clearances > Maintain Clearances. The Maintain Clearances workspace displayed.

The screenshot shows the 'Maintain Clearances' workspace with a 'Clearance Search' form. The form includes various search criteria such as Type (Regular), Effective Date, Approved By, Approved Date, Reason Code, Deal ID, Deal Detail ID, Status, Created By, Create Date, Price Guide, Out Of Stock Date, Reset Date, Department, Class, Subclass, Item Type (Item), Item Level (Transaction Level Item), Diff Type (- Select -), Item, Diff, Zone Group, Zone, Location, and Market Basket Code. There are also checkboxes for 'Search On This Level Only' and 'Search On This Level Only'. The bottom of the form has 'Clear', 'Search', and 'Cancel' buttons.

Maintain Clearances workspace

1. Search for and retrieve the clearance for which you want to create an item exception. Your results are displayed in the Clearance List pane..

The screenshot shows the 'Clearance List' pane with a table of clearance results. The table has columns for ID, Item, Item Description, Item Level, Diff ID, Diff ID Description, Location, Location Description, Location Type, Primary Zone, Exception Ind, Parent ID, Current Unit, and Currency. A single row is visible with the following data:

ID	Item	Item Description	Item Level	Diff ID	Diff ID Description	Location	Location Description	Location Type	Primary Zone	Exception Ind	Parent ID	Current Unit	Currency
697	1000	DOC Item 1	Transaction...			283	dv test 27		Primary Zone				\$4

Below the table, there is a 'Status' dropdown set to 'Worksheet', an 'Action' dropdown set to '- Select -', and an 'Update' button. At the bottom, there are buttons for 'Delete', 'New', 'Copy', 'Loc Exception', 'Tran Exception', 'Conflict Check', and 'Select All'.

Clearance List pane



Note: Item exceptions at the transaction level can occur only when the price change was created at the item parent level.

2. From the list of results, select the price change.

- Click **Tran Exceptions**. The item selection area of the Clearance Maintenance pane is enabled.

Clearance Maintenance

Type: ☒ Regular ☐ Vendor Funded

* Effective Date: 10/01/2004

* Price Change Type: Change By Amount

Change Amount: 2.00

Price Guide:

* Reason Code: 5-2

Out Of Stock Date:

Reset Date: 10/12/2004

Earliest Reset Date: 10-12-2004

Latest Reset Date: 10-12-2004

Location Selection

Clear Delete Select

Level	ID	Description	Location Type
Zone	30	Z1-USD	


Item Selection

Clear Delete Select

Level	ID	Diff ID	Description
Item	12342		SH-Item for dev:32 Waist X32 Inseam

Apply

Clearance Maintenance pane

- In the Item field, enter the ID of the item for which items are different than the rest of the locations on the price change, or click the LOV  button and select a location.
- In the enable price change fields, enter information about the price change for the item/location.
- Click **Apply** to add any changes.
- Click **Done** to save any changes and close the window.

Chapter 6 – Promotions

Basic promotions

Create a promotion

Overview

A promotion event is a method of grouping promotions that occur during a period of time. Each event can be associated with many promotions, but a promotion can only be associated with one event.


Procedures


Create a promotion event

⇒ **Navigate:** From the Task Pad, select Promotion Events > Create/Maintain Events. The Maintain Promotion Events workspace is displayed.

Event Id	Event Description	Theme	Start Date	End Date
67	The Never Ending Event		10-31-2004	10-31-2005
73	RF 21 testing	I Don't Know	10-19-2004	10-31-2004
74	Alli Event		11-01-2004	12-01-2005
68	zmm promo event	event	08-02-2005	08-31-2005
65	Fall Event	Apple	10-14-2004	10-15-2004
66	Starts today	Fun	10-01-2004	10-23-2004

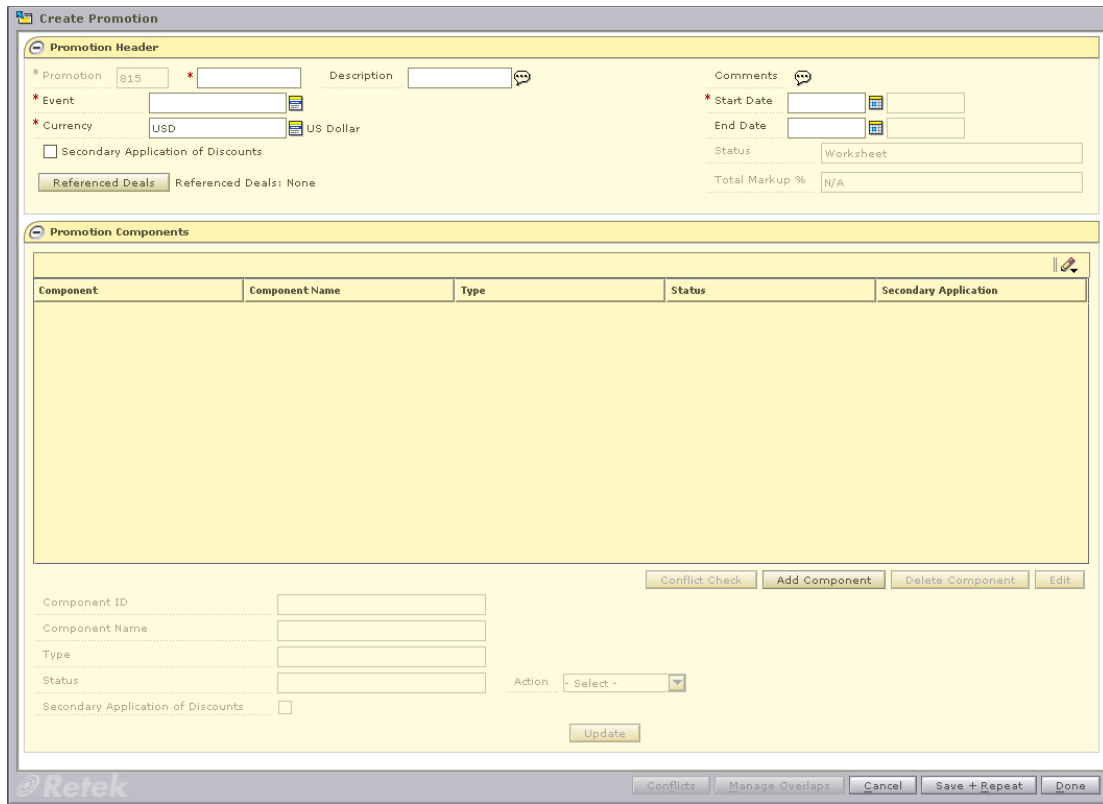
Maintain Promotion Events workspace

1. In the Promotion Events section, click **New**.
2. In the Event Description field, enter a name for the event you are creating.
3. In the Theme field, enter any additional informative information about the event.
4. In the Start Date and Time fields:
 - a. In the first field, enter the date the event starts, or click the LOV  button and select a date.
 - b. In the second field, enter the time the event starts.

5. In the End Date and Time fields:
 - a. In the first field, enter the date the event ends, or click the LOV  button and select a date.
 - b. In the second field, enter the time the event ends.
6. Click **Apply**. The promotion event is added to the table.
7. Click **Done** to save any changes and close the window.

Add a promotion to an event

1. In the Maintain Promotion Events pane, click **Add Promotion**. The Create Promotion workspace is displayed.



The screenshot shows the 'Create Promotion' workspace. The 'Promotion Header' section includes fields for Promotion ID (815), Event, Currency (USD), Description, Start Date, End Date, Status (Worksheet), and Total Markup % (N/A). There is also a checkbox for 'Secondary Application of Discounts' and a 'Referenced Deals' section. The 'Promotion Components' section features a table with columns: Component, Component Name, Type, Status, and Secondary Application. Below the table are fields for Component ID, Component Name, Type, Status, and a checkbox for 'Secondary Application of Discounts'. There is also an 'Action' dropdown menu and an 'Update' button. At the bottom of the window, there are buttons for 'Conflicts', 'Manage Overlaps', 'Cancel', 'Save + Repeat', and 'Done'.

Create Promotion workspace

2. Add the appropriate details to create a promotion.

Create a promotion

Overview

A promotion is a temporary reduction in price. In addition, you can track sales at one or more locations for a given time period as well as track the sales of merchandise with no price reductions, at given locations for a set time period.

Procedures

Create a promotion

⇒ **Navigate:** From the Task Pad, select Promotion > Create Promotion. The Create Promotion workspace is displayed.

OR

From the Maintain Promotion Events workspace, click **New Promotion**. The Create Promotion workspace is displayed.

The screenshot shows the 'Create Promotion' workspace. The top section, 'Promotion Header', contains fields for:


- Promotion:** A text field with '815' entered.
- Description:** A text field.
- Comments:** A text area.
- Event:** A text field with a 'LOV' button next to it.
- Currency:** A dropdown menu showing 'USD' and 'US Dollar'.
- Start Date:** A date picker.
- End Date:** A date picker.
- Status:** A dropdown menu showing 'Worksheet'.
- Total Markup %:** A text field showing 'N/A'.
- Secondary Application of Discounts:** A checkbox.
- Referenced Deals:** A button.

 The bottom section, 'Promotion Components', contains a table with the following columns: Component, Component Name, Type, Status, and Secondary Application. Below the table are fields for:

- Component ID:** A text field.
- Component Name:** A text field.
- Type:** A text field.
- Status:** A text field.
- Secondary Application of Discounts:** A checkbox.
- Action:** A dropdown menu showing 'Select'.

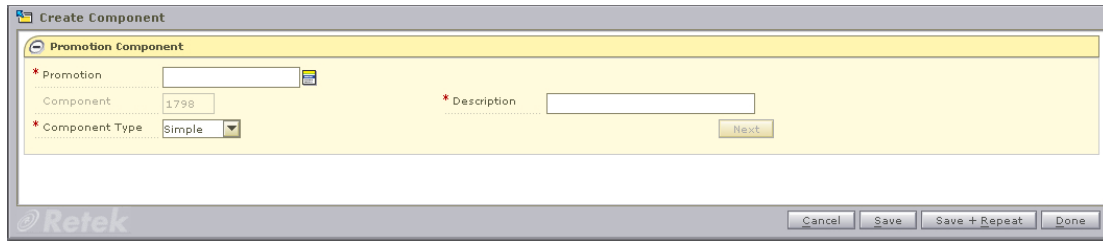
 At the bottom of the workspace are buttons for 'Conflict Check', 'Add Component', 'Delete Component', 'Edit', 'Update', 'Conflicts', 'Manage Overlaps', 'Cancel', 'Save + Repeat', and 'Done'. The Retek logo is visible in the bottom left corner.

Create Promotion workspace

1. In the field to the left of the Promotion field, enter the name of the promotion.
2. In the Description field, enter additional information as necessary.
3. In the Event field, enter the ID of the event you want to associate with the promotion, or click the LOV  button and select an event.
4. Update the Currency, Start Date, and End Date field as necessary.

Add components to a promotion

1. In the Promotion Components pane, click **Add Component**. The Create Component workspace is displayed.



Create Component workspace

2. Add the appropriate type of component to the promotion to:
 - Create a simple component
 - Create a threshold component
 - Create a buy/get component

Create a threshold definition

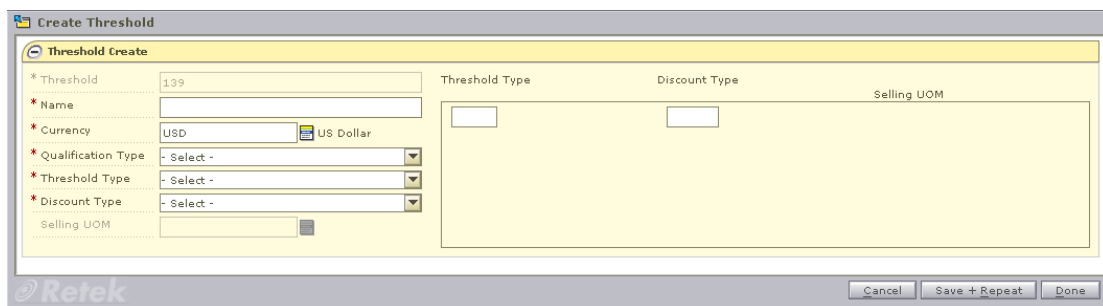
Overview

A threshold is a discount that a customer receives for purchasing a pre-determined amount of an item. You must define the levels that exist in the threshold, then associate the threshold definition to the threshold component.


Procedure

Create a threshold definition

- ⇒ **Navigate:** From the Task Pad, select Promotion Threshold > Create Threshold. The Create Threshold workspace is displayed.



Create Threshold workspace

1. In the Name field, enter a description of the threshold you are creating.
2. In the Currency field, enter the ID of the appropriate currency, or click the LOV  button and select a currency.

3. In the Qualification Type field, select how the threshold is met:
 - **Threshold Level:** All items on the promotion can be counted together to meet the terms of the threshold and have the promotion applied.
 - **Item Level:** Each item on the promotion must meet the threshold to have the discount applied.
4. In the Threshold Type field, select the measure that indicates how the threshold is met:
 - **Quantity:** A number of units of an item must be purchased by the customer from the retailer.
 - **Amount:** A value of the item must be purchased by the customer from the retailer.
5. In the Discount Type field, select the method used to determine the new price of the item.
 - **Percent Off:** A price for an item is changed by a percentage removed from the original price. The percent of change is determined by the percent entered in the Change Amount field.
 - **Amount Off:** A price for an item is changed by an amount removed from the original price. The amount of change is determined by the amount entered in the Change Amount field.
 - **Fixed Price:** The price for the item will be at a specified retail that will be defined in the change amount field.
6. If you choose Fixed Price in the Discount type field, you must enter the Selling UOM for the item.
7. In the threshold area on the right, enter the amount or quantity that needs to be purchased in the Threshold Type field.
8. In the Discount Type field, enter the percent off, amount off, or fixed price received.
9. Press **Tab** to add additional threshold levels.
10. Click **Done** to save any changes and close the window.

Create components

Create a simple component

Overview

A simple promotion component consists of an item, item group, or merchandise level that receives a discount at a specific location or group of locations when the customer purchases an item.

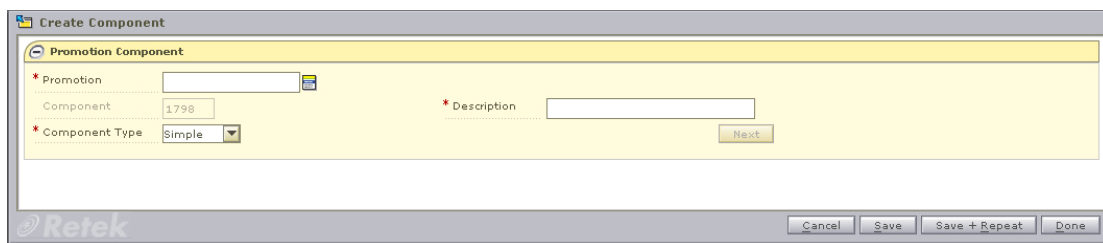
Procedures

Create a simple component


⇒ **Navigate:** From the Task Pad, select Promotions > Create Component. The Create Component workspace is displayed.

OR

From the Create Promotion workspace, click **Add Component** in the Promotion Components pane. The Create Component workspace is displayed.




Create Component workspace

1. In the Promotion field, enter the ID the promotion is associated with, or click the LOV  button and select the promotion.
2. In the Description field, enter a description of the component.
3. In the Component Type field, select Simple.

4. Click **Next**. The Promotion Component - Simple pane is displayed.


Promotion Component - Simple


Promotion:  smm promo


Component: Description:

Component Type:

Item Selection

Department:  +


Class:  +


Subclass:  +

Item Type:

Item Level:


Diff Type:


Item:  +


Diff:  +

Item Selection			
Level	ID	Diff ID	Description

Location Selection

Zone Group:  +

Zone:  +



Location:  +

Location Selection			
Level	ID	Description	Location Type

* Change Type:

Promotion Component - Simple pane

Add items and locations to a promotion component


1. In the Item Selection area, enter the criteria you want to use to select the items on promotion, or click the LOV  button and select the criteria.
2. Click **Select**. The items are added to the Item Selection table.
3. In the Location Selection area, select how you want to add locations to the promotion, or click the LOV  button and select the criteria.
4. Click **Select**. The locations are added to the Location Selection table.
5. In the Change Type field, select the price change that occurs during the promotion:
 - **Change By Percent:** A price for an item is changed by a percentage removed from the original price. The percent of change is determined by the percent entered in the Change Amount field.
 - **Change By Amount:** A price for an item is changed by an amount removed from the original price. The amount of change is determined by the amount entered in the Change Amount field.
 - **Fixed Price:** The price for the item will be at a specified retail that will be defined in the change amount field.

- **No Change:** The price of the item is not changed. For reporting purposes, the item is recognized as being on promotion.
- **Exclude:** The item will not be affected by price changes that occur as a result of the promotion.

6. In the Change Amount field, enter the amount, percent, or fixed amount the price changes.



Note: There is no need to enter a negative sign before the number entered in the Change Amount field. A promotion can only exist as a decrease in price.

7. In the Selling UOM field, enter the unit of measure for the items, or click the LOV  button and select the selling UOM.

8. Update the Start and End Date & Time fields as necessary.

9. In the Apply To fields, select the types of item pricing that you want to apply the promotion.

10. Click **Apply**. The promotion is displayed in the Promotion Component Detail Maintenance pane.

11. Click **Done** to save any changes and close the workspace.

Create a threshold component

Overview

A threshold promotion component consists of an item, item group, or merchandise level that receives a discount at a location or group of locations when the customer purchases a quantity or a amount of an item. You must define the threshold levels before you can create the threshold component.


Procedures

⇒ **Navigate:** From the Task Pad, select Promotions > Create Component. The Create Component workspace is displayed.

OR

From the Create Promotion workspace, click **Add Component** in the Promotion Components pane. The Create Component workspace is displayed.

Create Component workspace

1. In the Promotion field, enter the ID the promotion is associated with, or click the LOV  button and select the promotion.
2. In the Description field, enter a description of the component.
3. In the Component Type field, select Threshold.

- Click **Next**. The Promotion Component - Threshold pane is displayed.

Promotion Component - Threshold

Promotion: 784 smm promo
 Component: 1801 Description: smm
 Component Type: Threshold **Next**

Item Selection

Level	ID	Diff ID	Description

Location Selection

Zone Group:
 Zone: +
 Location: +

Level	ID	Description	Location Type

* Threshold: **New Threshold**

* Start Date & Time: 08/02/2005 12:00 AM
 End Date & Time: 08/31/2005 11:59 PM
 * Apply To: - Select -

Promotion Component - Threshold pane

Add items and locations to a promotion component

- In the Item Selection area, enter the criteria you want to use to select the items on promotion, or click the LOV button and select the criteria.
- Click **Select**. The items are added to the Item Selection table.
- In the Location Selection area, select how you want to add locations to the promotion, or click the LOV button and select the criteria.
- Click **Select**. The locations are added to the Location Selection table.
- In the Threshold field, select the threshold you want to associate with the promotion, or click **New Threshold** to create a threshold definition.
- Update the Start and End Date & Time fields as necessary.
- In the Apply To fields, select the types of item pricing that you want to apply the promotion.
- Click **Apply**. The promotion is displayed in the Promotion Component Detail Maintenance pane.
- Click **Done** to save any changes and close the window.

Create a buy/get component

Overview

A buy/get promotion component consists of an item, item group, or merchandise level allows you to define which items must purchased by the customer in order to receive a discount for an additional item.

Procedures


Create a buy/get component

⇒ **Navigate:** From the Task Pad, select Promotions > Create Component. The Create Component workspace is displayed.

OR

From the Create Promotion workspace, click **Add Component** in the Promotion Components pane. The Create Component workspace is displayed.

Create Component workspace

1. In the Promotion field, enter the ID the promotion is associated with, or click the LOV  button and select the promotion.
2. In the Description field, enter a description of the component.
3. In the Component Type field, select Buy/Get.

- Click **Next**. The Promotion Component - Buy Get pane is displayed.

Promotion Component - Buy Get

Promotion: 776 ☐ On Promotion

Component: 1798 Description: buy get promo component

Component Type: Buy/Get

Buy Item

Type: ☐ All ☒ Any

Quantity:

Get Item

Type: - Select -

Selling UOM:

Amount:

* Start Date & Time: 10/15/2004 12:00 AM

End Date & Time: 10/23/2004 11:59 PM

Select Items

Buy Items		Get Items	
Item	Description	Item	Description

Location Selection



Level	ID	Description	Location Type

Apply To: - Select -




Promotion Component - Buy Get pane

Define the buy/get terms

- In the Buy Item area, select how the items on the list of buy items must be purchased.
 - All:** All the items on the Buy Items list must be purchased in order to receive the discount
 - Any:** Any of the items on the Buy Items list must be purchase in order to receive the discount.
- In the Quantity field, enter the number of items that need to be purchased in order to receive the discount.

3. In the Get Item area, select the type of discount received when the qualifying items and quantity is purchased.
 - **Percent Off:** A price for an item is changed by a percentage removed from the original price. The percent of change is determined by the percent entered in the Change Amount field.
 - **Amount Off:** A price for an item is changed by an amount removed from the original price. The amount of change is determined by the amount entered in the Change Amount field.
 - **Fixed Price:** The price for the item will be at a specified retail that will be defined in the change amount field.
 4. In the Selling UOM field, enter the unit of measure for the items, or click the LOV  button and select the selling UOM.
 5. In the Change Amount field, enter the amount, percent, or fixed amount the price changes.
-  **Note:** There is no need to enter a negative sign before the number entered in the Change Amount field. A promotion can only exist as a decrease in price.
6. Update the Start and End Date & Time fields as necessary.

Add items and locations to a promotion component

-  **Note:** You may have to expand the Select Items and Location Selection area to view the criteria
1. In the Item Selection area, enter the criteria you want to use to select the items on promotion, or click the LOV  button and select the criteria.
 2. Add the items to the Buy Items or Get Items table.
 - Click **Add to Buy Items** to add items to the list of items that qualify the purchaser for the discount.
 - Click **Add to Get Items** to add items to the list of items that receive the discount.
 3. In the Location Selection area, select how you want to add locations to the promotion, or click the LOV  button and select the criteria.
 4. Click **Select**. The locations are added to the Location Selection table.
 5. In the Apply To field, select the types of item pricing that you want to apply the promotion.
 6. Click **Apply**. The promotion is displayed in the Promotion Component Detail Maintenance pane.
 7. Click **Done** to save any changes and close the window.

Deal based promotions

Create a promotion

Overview

A promotion event is a method of grouping promotions that occur during a period of time. Each event can be associated with many promotions, but a promotion can only be associated with one event.


Procedures


Create a promotion event

⇒ **Navigate:** From the Task Pad, select Promotion Events > Create/Maintain Events. The Maintain Promotion Events workspace is displayed.

Event Id	Event Description	Theme	Start Date & Time	End Date & Time
65	Fall Event	Apple	10/14/2004 12:00 AM	10/15/2004 11:59 PM
67	The Never Ending Event		10-31-2004	10-31-2005
73	RF 21 testing	I Don't Know	10-19-2004	10-31-2004
74	Alli Event		11-01-2004	12-01-2005
68	smm promo event	event	08-02-2005	08-31-2005
65	Fall Event	Apple	10-14-2004	10-15-2004
66	Starts today	Fun	10-01-2004	10-23-2004

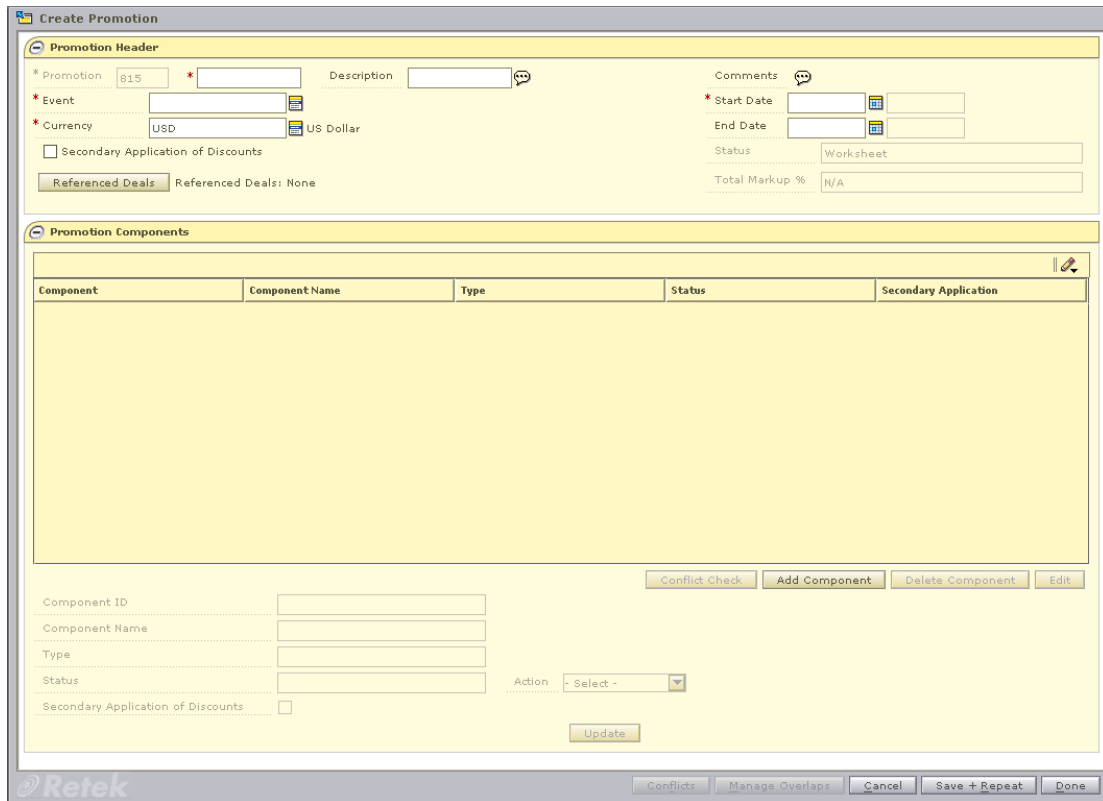
Maintain Promotion Events workspace

1. In the Promotion Events section, click **New**.
2. In the Event Description field, enter a name for the event you are creating.
3. In the Theme field, enter any additional informative information about the event.
4. In the Start Date and Time fields:
 - a. In the first field, enter the date the event starts, or click the LOV  button and select a date.
 - b. In the second field, enter the time the event starts.

5. In the End Date and Time fields:
 - a. In the first field, enter the date the event ends, or click the LOV  button and select a date.
 - b. In the second field, enter the time the event ends.
6. Click **Apply**. The promotion event is added to the table.
7. Click **Done** to save any changes and close the window.

Add a promotion to an event

1. In the Maintain Promotion Events pane, click **Add Promotion**. The Create Promotion workspace is displayed.



The screenshot shows the 'Create Promotion' workspace. The 'Promotion Header' section includes fields for Promotion ID (815), Description, Event, Currency (USD), Start Date, End Date, Status (Worksheet), and Total Markup % (N/A). There is also a checkbox for 'Secondary Application of Discounts' and a 'Referenced Deals' section. The 'Promotion Components' section features a table with columns: Component, Component Name, Type, Status, and Secondary Application. Below the table are input fields for Component ID, Component Name, Type, Status, and a checkbox for 'Secondary Application of Discounts'. There is also an 'Action' dropdown menu and an 'Update' button. At the bottom of the window, there are buttons for 'Conflicts', 'Manage Overlaps', 'Cancel', 'Save + Repeat', and 'Done'. The Retek logo is visible in the bottom left corner.

Create Promotion workspace

2. Add the appropriate details to create a promotion.

Create a promotion

Overview

A promotion is a temporary reduction in price. In addition, you can track sales at one or more locations for a given time period as well as track the sales of merchandise with no price reductions, at given locations for a set time period.

Procedures

Create a promotion

⇒ **Navigate:** From the Task Pad, select Promotion > Create Promotion. The Create Promotion workspace is displayed.

OR

From the Maintain Promotion Events workspace, click **New Promotion**. The Create Promotion workspace is displayed.

The screenshot shows the 'Create Promotion' workspace. It is divided into two main sections: 'Promotion Header' and 'Promotion Components'.

Promotion Header:

- * Promotion:** 815
- Description:** [Empty field]
- * Event:** [Empty field]
- * Currency:** USD (US Dollar)
- ☐ Secondary Application of Discounts
- Referenced Deals:** Referenced Deals: None
- Comments:** [Empty field]
- * Start Date:** [Empty field]
- End Date:** [Empty field]
- Status:** Worksheet
- Total Markup %:** N/A

Promotion Components:

Component	Component Name	Type	Status	Secondary Application
-----------	----------------	------	--------	-----------------------


Below the table, there are input fields for:

- Component ID
- Component Name
- Type
- Status
- Secondary Application of Discounts (checkbox)
- Action: Select - [Dropdown]

Buttons at the bottom of the components section include: Conflict Check, Add Component, Delete Component, Edit, and Update.

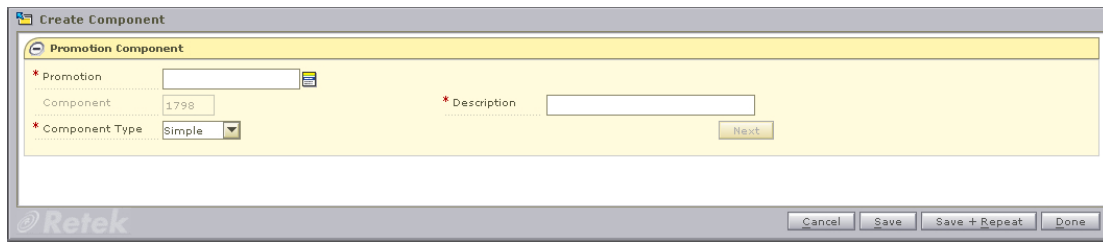
The Retek logo is visible in the bottom left corner. At the bottom right, there are buttons: Conflicts, Manage Overlaps, Cancel, Save + Repeat, and Done.

Create Promotion workspace

1. In the field to the left of the Promotion field, enter the name of the promotion.
2. In the Description field, enter additional information as necessary.
3. In the Event field, enter the ID of the event you want to associate with the promotion, or click the LOV  button and select an event.
4. Update the Currency, Start Date, and End Date field as necessary.

Add components to a promotion

1. In the Promotion Components pane, click **Add Component**. The Create Component workspace is displayed.



Create Component workspace

2. Add the appropriate type of component to the promotion to:
 - Create a simple component
 - Create a threshold component
 - Create a buy/get component

Create vendor funding defaults

Overview

When an item is on promotion at a retailer, part of the discount a customer receives may be contributed by the vendor. When you set up a promotion, you can define the vendor's contribution.


You can create billing information defaults at the vendor level, which allows you to apply the information to any deal that is created through the promotions dialog that is associated with the vendor

Procedures

Create a vendor funded default

⇒ **Navigate:** From the Task Pad, select Vendor Funding Defaults > Create Defaults. The Create Defaults workspace is displayed.

Create Defaults workspace

1. In the Vendor Type field, select the type of vendor that is contributing to the promotion.
2. In the Vendor field, enter the ID of the vendor, or click the LOV  button and select a vendor.
3. In the Deal Reporting Level field, select how often frequency of deal reporting.
4. In the Bill Back Method field, select how the type of invoice that is created for the supplier
5. In the Bill Back Period field, select the frequency that the vendor is charged for the bill back.
6. In the Invoice Processing Logic field, select the method used to create invoices. Invoices are created automatically, manually, or not at all depending on the option selected.
7. Select the Include VAT in Deal Billing check box to indicate that VAT should be included in the invoice information
8. Select the Include Deal Income in Stock Ledger check box to indicate that deal income accrual should be written to the stock ledger.
9. Click **Done** to save any changes and close the window.

Edit vendor funded defaults

⇒ **Navigate:** From the Task Pad, select Vendor Funding Defaults > Maintain Defaults. The Maintain Defaults workspace is displayed.

Vendor Type	Vendor	Deal Reporting	Bill Back Method	Bill Back Period	Invoice Processing	Inc VAT in Deal	Inc Deal Income
Supplier	Max Brown ...	Quarter	Credit Note	Quarter	Automatic	<input type="checkbox"/>	<input type="checkbox"/>
Supplier	Test Supplier	Quarter	Debit Note	Week	Automatic	<input type="checkbox"/>	<input type="checkbox"/>
Supplier	*Nemo Dry ...	Month	Credit Note	Annual	Automatic	<input type="checkbox"/>	<input checked="" type="checkbox"/>

* Vendor Type: * Vendor: Test Supplier

* Deal Reporting Level: * Invoice Processing Logic:

* Bill Back Method: * Include VAT in Deal Billing: ☐

* Bill Back Period: * Include Deal Income in Stock Ledger: ☐

Buttons: Delete, Edit, Apply, Cancel, Save + Repeat, Done

Maintain Defaults workspace

1. On the table, select a vendor.
2. Click **Edit**. The details area is enabled.
3. Update the enabled fields as necessary.
4. Click **Apply** to add your changes to the table.
5. Click **Done** to save any change and close the window.

Delete a vendor funded default

⇒ **Navigate:** From the Task Pad, select Vendor Funding Defaults > Maintain Defaults. The Maintain Defaults workspace is displayed.

Vendor Type	Vendor	Deal Reporting	Bill Back Method	Bill Back Period	Invoice Processing	Inc VAT in Deal Billing	Inc Deal Income
Supplier	Max Brown ...	Quarter	Credit Note	Quarter	Automatic	<input type="checkbox"/>	<input type="checkbox"/>
Supplier	Test Supplier	Quarter	Debit Note	Week	Automatic	<input type="checkbox"/>	<input type="checkbox"/>
Supplier	*Nemo Dry ...	Month	Credit Note	Annual	Automatic	<input type="checkbox"/>	<input checked="" type="checkbox"/>

* Vendor Type: * Vendor:

* Deal Reporting Level: * Invoice Processing Logic:

* Bill Back Method: * Include VAT in Deal Billing: ☐

* Bill Back Period: * Include Deal Income in Stock Ledger: ☐

Maintain Defaults workspace

1. On the table, select a vendor.
2. Click **Delete**. You are prompted to confirm your decision.
3. Click **Yes**.
4. Click **Done** to save any change and close the window.

Create components

Create a simple component

Overview

A simple promotion component consists of an item, item group, or merchandise level that receives a discount at a specific location or group of locations when the customer purchases an item.

Procedures


Create a simple component

⇒ **Navigate:** From the Task Pad, select Promotions > Create Component. The Create Component workspace is displayed.

OR


From the Create Promotion workspace, click **Add Component** in the Promotion Components pane. The Create Component workspace is displayed.

Create Component workspace

1. In the Promotion field, enter the ID the promotion is associated with, or click the LOV  button and select the promotion.
2. In the Description field, enter a description of the component.
3. In the Component Type field, select Simple.

4. Click **Next**. The Promotion Component - Simple pane is displayed.


Promotion Component - Simple


Promotion:  smm promo


Component: Description:

Component Type:

Item Selection

Department:  +


Class:  +


Subclass:  +

Item Type:

Item Level:


Diff Type:


Item:  +


Diff:  +

Item Selection			
Level	ID	Diff ID	Description

Location Selection

Zone Group:  +

Zone:  +



Location:  +

Location Selection			
Level	ID	Description	Location Type

* Change Type:

Promotion Component - Simple pane

Add items and locations to a promotion component


1. In the Item Selection area, enter the criteria you want to use to select the items on promotion, or click the LOV  button and select the criteria.
2. Click **Select**. The items are added to the Item Selection table.
3. In the Location Selection area, select how you want to add locations to the promotion, or click the LOV  button and select the criteria.
4. Click **Select**. The locations are added to the Location Selection table.

5. In the Change Type field, select the price change that occurs during the promotion:
 - **Change By Percent:** A price for an item is changed by a percentage removed from the original price. The percent of change is determined by the percent entered in the Change Amount field.
 - **Change By Amount:** A price for an item is changed by an amount removed from the original price. The amount of change is determined by the amount entered in the Change Amount field.
 - **Fixed Price:** The price for the item will be at a specified retail that will be defined in the change amount field.
 - **No Change:** The price of the item is not changed. For reporting purposes, the item is recognized as being on promotion.
 - **Exclude:** The item will not be affected by price changes that occur as a result of the promotion.

6. In the Change Amount field, enter the amount, percent, or fixed amount the price changes.



Note: There is no need to enter a negative sign before the number entered in the Change Amount field. A promotion can only exist as a decrease in price.

7. In the Selling UOM field, enter the unit of measure for the items, or click the LOV  button and select the selling UOM.
8. Update the Start and End Date & Time fields as necessary.
9. In the Apply To fields, select the types of item pricing that you want to apply the promotion.
10. Click **Apply**. The promotion is displayed in the Promotion Component Detail Maintenance pane.
11. Click **Done** to save any changes and close the workspace.

Create a threshold component

Overview

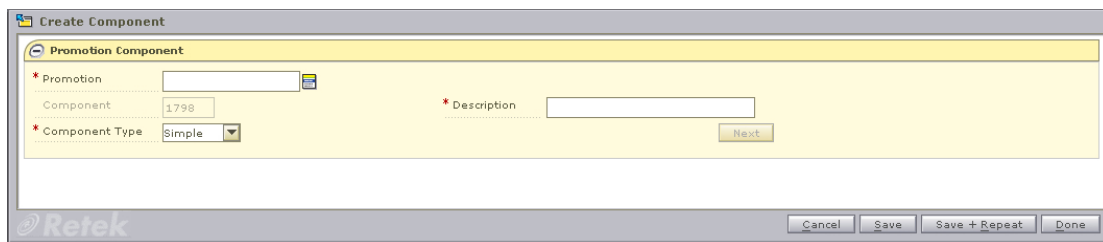
A threshold promotion component consists of an item, item group, or merchandise level that receives a discount at a location or group of locations when the customer purchases a quantity or a amount of an item. You must define the threshold levels before you can create the threshold component.

Procedures


⇒ **Navigate:** From the Task Pad, select Promotions > Create Component. The Create Component workspace is displayed.

OR

From the Create Promotion workspace, click **Add Component** in the Promotion Components pane. The Create Component workspace is displayed.



Create Component workspace

1. In the Promotion field, enter the ID the promotion is associated with, or click the LOV  button and select the promotion.
2. In the Description field, enter a description of the component.
3. In the Component Type field, select Threshold.

4. Click **Next**. The Promotion Component - Threshold pane is displayed.

Promotion Component - Threshold

Promotion: 784 smm promo
 Component: 1801 Description: smm
 Component Type: Threshold **Next**

Item Selection

Level	ID	Diff ID	Description

Location Selection

Zone Group:
 Zone: +
 Location: +

Level	ID	Description	Location Type

* Threshold: **New Threshold**

* Start Date & Time: 08/02/2005 12:00 AM
 End Date & Time: 08/31/2005 11:59 PM
 * Apply To: - Select -

Promotion Component - Threshold pane

Add items and locations to a promotion component

1. In the Item Selection area, enter the criteria you want to use to select the items on promotion, or click the LOV button and select the criteria.
2. Click **Select**. The items are added to the Item Selection table.
3. In the Location Selection area, select how you want to add locations to the promotion, or click the LOV button and select the criteria.
4. Click **Select**. The locations are added to the Location Selection table.
5. In the Threshold field, select the threshold you want to associate with the promotion, or click **New Threshold** to create a threshold definition.
6. Update the Start and End Date & Time fields as necessary.
7. In the Apply To fields, select the types of item pricing that you want to apply the promotion.
8. Click **Apply**. The promotion is displayed in the Promotion Component Detail Maintenance pane.
9. Click **Done** to save any changes and close the window.

Create a buy/get component

Overview

A buy/get promotion component consists of an item, item group, or merchandise level allows you to define which items must purchased by the customer in order to receive a discount for an additional item.

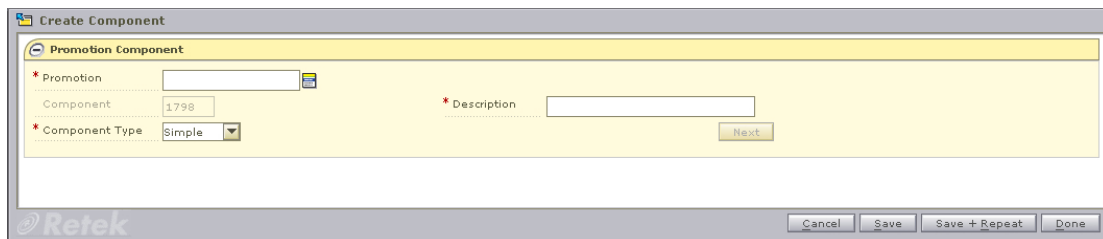
Procedures

Create a buy/get component


⇒ **Navigate:** From the Task Pad, select Promotions > Create Component. The Create Component workspace is displayed.

OR

From the Create Promotion workspace, click **Add Component** in the Promotion Components pane. The Create Component workspace is displayed.



Create Component workspace

1. In the Promotion field, enter the ID the promotion is associated with, or click the LOV  button and select the promotion.
2. In the Description field, enter a description of the component.
3. In the Component Type field, select Buy/Get.

4. Click **Next**. The Promotion Component - Buy Get pane is displayed.

Promotion Component - Buy Get

Promotion: 776 ☐ On Promotion

Component: 1798 Description: buy get promo component

Component Type: Buy/Get

Buy Item

Type: ☐ All ☒ Any

Quantity:

Get Item

Type: - Select -

Selling UOM:

Amount:

* Start Date & Time: 10/15/2004 12:00 AM

End Date & Time: 10/23/2004 11:59 PM

Select Items

Buy Items		Get Items	
Item	Description	Item	Description

Location Selection


Level	ID	Description	Location Type

Apply To: - Select -

Promotion Component - Buy Get pane

Define the buy/get terms

- In the Buy Item area, select how the items on the list of buy items must be purchased.
 - All:** All the items on the Buy Items list must be purchased in order to receive the discount
 - Any:** Any of the items on the Buy Items list must be purchase in order to receive the discount.
- In the Quantity field, enter the number of items that need to be purchased in order to receive the discount.
- In the Get Item area, select the type of discount received when the qualifying items and quantity is purchased.
 - Percent Off:** A price for an item is changed by a percentage removed from the original price. The percent of change is determined by the percent entered in the Change Amount field.
 - Amount Off:** A price for an item is changed by an amount removed from the original price. The amount of change is determined by the amount entered in the Change Amount field.
 - Fixed Price:** The price for the item will be at a specified retail that will be defined in the change amount field.

4. In the Selling UOM field, enter the unit of measure for the items, or click the LOV  button and select the selling UOM.

5. In the Change Amount field, enter the amount, percent, or fixed amount the price changes.





Note: There is no need to enter a negative sign before the number entered in the Change Amount field. A promotion can only exist as a decrease in price.

6. Update the Start and End Date & Time fields as necessary.

Add items and locations to a promotion component



Note: You may have to expand the Select Items and Location Selection area to view the criteria

1. In the Item Selection area, enter the criteria you want to use to select the items on promotion, or click the LOV  button and select the criteria.
2. Add the items to the Buy Items or Get Items table.
 - Click **Add to Buy Items** to add items to the list of items that qualify the purchaser for the discount.
 - Click **Add to Get Items** to add items to the list of items that receive the discount.
3. In the Location Selection area, select how you want to add locations to the promotion, or click the LOV  button and select the criteria.
4. Click **Select**. The locations are added to the Location Selection table.
5. In the Apply To field, select the types of item pricing that you want to apply the promotion.
6. Click **Apply**. The promotion is displayed in the Promotion Component Detail Maintenance pane.
7. Click **Done** to save any changes and close the window.

Add funding to a promotion

Overview

Funding is added to a promotion at the component level so that you can indicate the vendor that is contributing to the promotion. If you choose to create deals, based on the funded component, you must indicate the billing information for the deal. If the promotion is associated with an existing deal, the billing information defaults from the existing deal.

Procedures

Add funding to a simple component

1. Create a simple component
2. Expand the Funding pane.

Funding

Corporate Funding Percent: 10

Create Deals: ☒

Vendor Type: Supplier

Vendor: 5678 SUPPLIER-2

Deal ID:

Deal Comp ID:

Contribution %: 10

Use Deal Locations: ☐

Use Deal Items: ☐




Deal Billing

Clear Apply

Vendor Type	Vendor ID	Contribution %	Deal ID	Deal Comp ID	Use Deal Locations	Use Deal Items
-------------	-----------	----------------	---------	--------------	--------------------	----------------

Edit Delete

Funding pane for simple components

3. In the Corporate Funding Percent field, enter the percent that the retailer contributes to the promotion.
4. Select the Create Deals check box to create a deal based on this promotion component and funding.
5. In the Vendor Type field, select the type of vendor that is funding the component.
6. In the Vendor field, enter the ID of the vendor, or click the LOV  button and select a vendor.
7. In the Deal ID field, enter the deal the promotion is associated with, or click the LOV  button and select a deal.
8. In the Deal Comp ID, enter the ID of the deal component field, or click the LOV  button and select a deal component.



Note: The Deal and Deal ID field are disabled if you selected the Create Deals check box.

9. In the Contribution % field, enter the percentage that this vendor contributes to the promotion component.
10. Select the Use Deal Locations check box to indicate that the locations on the deal should be used for the promotion.
11. Select the Use Deal Items check box to indicate that the items on the deal should be used for the promotion.



Note: The Use Deal Locations and Use Deal Items check boxes are disabled if the promotion component already has items or locations.

12. If you selected the Create Deals check box, add billing information for a deal to a funded component.
13. Click **Apply** to add your changes to the table.
14. Click **Done** to save any changes and close the workspace.

Add funding to a threshold component

1. Create a threshold component.
2. Expand the Funding pane.

Funding

Corporate Funding Percent

10.0000

▼ Threshold Uptake %

Threshold	Discount	Selling UOM	Uptake %
\$5.00	0%		10%
\$10.00	0%		15%
\$15.00	0%		

Threshold

\$10.00

Uptake %

15

Apply

Create Deals

☒

Vendor Type

Manufacturer

Vendor

3333333333

WISE POTATO ...

Deal ID

Deal Comp ID

Contribution %

10

Use Deal Locations

☐

Use Deal Items

☐

Deal Billing

Clear

Apply




Vendor Type	Vendor ID	Contribution %	Deal ID	Deal Comp ID	Use Deal Locations	Use Deal Items
Supplier	6399	10%	9819	Pending	<input type="checkbox"/>	<input type="checkbox"/>

Edit

Delete

Funding pane for a threshold component

3. In the Corporate Funding Percent field, enter the percent that the retailer contributes to the promotion.
4. Select a threshold.

5. In the Uptake % field, enter the percentage of customers that you expect to take advantage of the promotion at this threshold.
6. Click **Apply** to add your changes to the table.
7. Select the Create Deals check box to create a deal based on this promotion component and funding.
8. In the Vendor Type field, select the type of vendor that is funding the component.
9. In the Vendor field, enter the ID of the vendor, or click the LOV  button and select a vendor.
10. In the Deal ID field, enter the deal the promotion is associated with, or click the LOV  button and select a deal.
11. In the Deal Comp ID, enter the ID of the deal component field, or click the LOV  button and select a deal component.



Note: The Deal and Deal ID field are disabled if you selected the Create Deals check box.

12. In the Contribution % field, enter the percentage that this vendor contributes to the promotion component.
13. Select the Use Deal Locations check box to indicate that the locations on the deal should be used for the promotion.
14. Select the Use Deal Items check box to indicate that the items on the deal should be used for the promotion.



Note: The Use Deal Locations and Use Deal Items check boxes are disabled if the promotion component already has items or locations.

15. If you selected the Create Deals check box, add billing information for a deal to a funded component.
16. Click **Apply** to add your changes to the table.
17. Click **Done** to save any changes and close the workspace.

Add funding to a buy/get component

1. Create a buy/get component.
2. Expand the Funding pane.

Funding

Corporate Funding Percent: 10

Uptake %: 10

Create Deals: ☒

Vendor Type: Manufacturer

Vendor: 3333333333 WISE POTATO ...

Deal ID: [button]

Deal Comp ID: [button]

Contribution %: 10




Use Deal Locations: ☐

Deal Billing: [button] Clear Apply

Vendor Type	Vendor ID	Contribution %	Deal ID	Deal Comp ID	Use Deal Locations
-------------	-----------	----------------	---------	--------------	--------------------

Edit Delete

Funding pane - Buy/Get component

3. In the Corporate Funding Percent field, enter the percent that the retailer contributes to the promotion.
4. In the Uptake % field, enter the percentage of customers that you expect to take advantage of the promotion at this threshold.
5. Select the Create Deals check box to create a deal based on this promotion component and funding.
6. In the Vendor Type field, select the type of vendor that is funding the component.
7. In the Vendor field, enter the ID of the vendor, or click the LOV  button and select a vendor.
8. In the Deal ID field, enter the deal the promotion is associated with, or click the LOV  button and select a deal.
9. In the Deal Comp ID, enter the ID of the deal component field, or click the LOV  button and select a deal component.
10. In the Contribution % field, enter the percentage that this vendor contributes to the promotion component.
11. Select the Use Deal Locations check box to indicate that the locations on the deal should be used for the promotion.



Note: The Deal and Deal ID field are disabled if you selected the Create Deals check box.



Note: The Use Deal Locations check boxes are disabled if the promotion component already has locations.

12. If you selected the Create Deals check box, add billing information for a deal to a funded component.
13. Click **Apply** to add your changes to the table.
14. Click **Done** to save any changes and close the workspace.

Add billing information for a deal to a funded component

1. Click **Deal Billing**. The Deal Billing window is displayed.
2. Select the information about the deal that you require:
 - **Deal Reporting Level:** The frequency that the deal is reported.
 - **Bill Back Method:** The type of invoice that is created for the supplier. Select the appropriate option.
 - **Bill Back Period:** The frequency that the vendor is charged for the bill back. Select when to charge the vendor.
 - **Invoice Processing Logic:** The method used to create invoices. Invoices are created automatically, manually, or not at all depending on the option selected.
 - **Include VAT in Deal Billing:** Select the check box to indicate that VAT should be included in the invoice information.
 - **Include Deal Income in Stock Ledger:** Select the check box to indicate that deal income accrual should be written to the stock ledger.
3. Click **Done** to save any changes and close the window.

Maintain a promotion

Maintain a promotion

Overview

Updates can be made to the details of an existing promotion and promotion components can be added to an existing promotion.

Procedures

Search for a promotion

⇒ **Navigate:** From the Task Pad, select Promotions > Maintain Promotion. The Promotions Search workspace is displayed.

The screenshot shows the 'Promotions Search' workspace. It features a 'Promotion Search Results' pane with a table of results. Below the table are 'Delete' and 'Edit' buttons. At the bottom, there is a 'Promotion Search Criteria' pane and a 'Cancel' button.

Promotion	Promotion Name	Start Date	End Date	Status	Theme
752	Test 1	10-14-2004	10-15-2004	Approved *	Apple
755	1	10-14-2004	10-15-2004	Approved	Apple
757	CN-1	10-31-2004	10-31-2005	Worksheet	
758	CN-2	10-31-2004	10-31-2005	Worksheet	
759	smm promo	08-02-2005	08-31-2005	Worksheet	event
760	smm promotion	08-02-2005	08-31-2005	Worksheet	event
763	Corin Date Test	10-01-2004	10-23-2004	Worksheet	Fun

Promotions Search workspace

1. Expand the Promotion Search Criteria pane.

The screenshot shows the 'Promotion Search Criteria' pane with various search filters. The 'Location' and 'Advanced Search' sections are expanded. At the bottom, there are 'Refresh' and 'Search' buttons.

Search Criteria:

- Promotion: [Text Field]
- Currency: [Text Field]
- Start Date: After [Date Picker]
- End Date: After [Date Picker]
- Item: [Text Field]
- Event: [Text Field]
- Status: [Text Field]
- Before: [Text Field]
- Before: [Text Field]

Location: [Expanded Section]

Advanced Search: [Expanded Section]

Promotion Search Criteria pane

2. Enter or select the criteria to limit your search.
3. Click **Search**. Promotions that match this criteria are displayed in the Promotion Search Results pane.

Maintain a promotion

⇒ **Navigate:** From the Task Pad, select Promotions > Maintain Promotion. The Promotions Search workspace is displayed.

The screenshot shows the 'Promotions Search' workspace. It features a 'Promotion Search Results' pane with a table listing several promotions. Below the table are 'Delete' and 'Edit' buttons. At the bottom, there is a 'Promotion Search Criteria' section and a 'Cancel' button.

Promotion	Promotion Name	Start Date	End Date	Status	Theme
752	Test 1	10-14-2004	10-15-2004	Approved *	Apple
755	1	10-14-2004	10-15-2004	Approved	Apple
757	CN-1	10-31-2004	10-31-2005	Worksheet	
758	CN-2	10-31-2004	10-31-2005	Worksheet	
759	smm promo	08-02-2005	08-31-2005	Worksheet	event
760	smm promotion	08-02-2005	08-31-2005	Worksheet	event
763	Corin Date Test	10-01-2004	10-23-2004	Worksheet	Fun

Promotions Search workspace

1. Search for a promotion.
2. In the Promotion Search Results pane, select the promotion you want to edit.
3. Click **Edit**. The Maintain Promotion workspace is displayed.

The screenshot shows the 'Maintain Promotion' workspace. It is divided into two main sections: 'Promotion Header' and 'Promotion Components'.

Promotion Header: This section contains various input fields for editing a promotion. Fields include:

- * Promotion: 784
- * Event: 68
- * Currency: USD
- Description: funding promo
- * Start Date: 08/02/2005 12:00 AM
- * End Date: 08/31/2005 11:59 PM
- Status: Submitted
- Total Markup %: N/A

 There are also checkboxes for 'Secondary Application of Discounts' and 'Referenced Deals' (currently set to None).

Promotion Components: This section contains a table of promotion components.

Component	Component Name	Type	Status	Secondary Application
1751	threshold - funding	Threshold	Submitted	<input type="checkbox"/>

 Below the table are buttons for 'Conflict Check', 'Add Component', 'Delete Component', and 'Edit'.

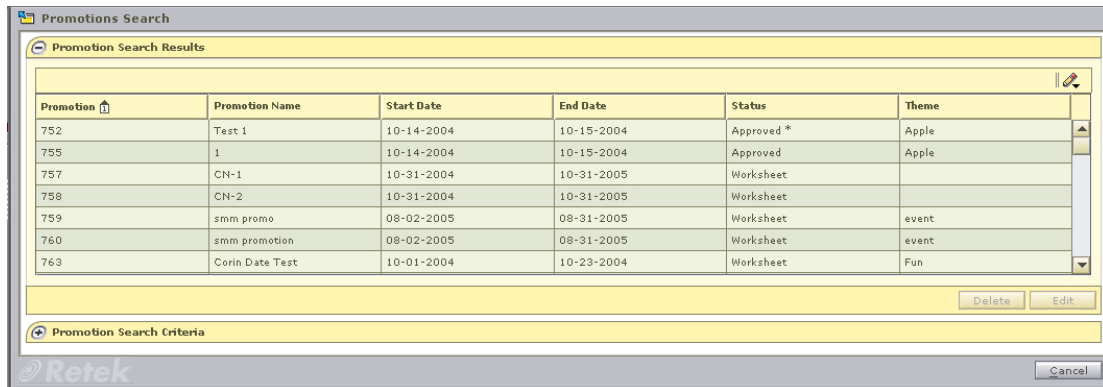
At the bottom of the workspace, there are additional input fields for 'Component ID', 'Component Name', 'Type', 'Status', and 'Secondary Application of Discounts', along with an 'Update' button. The bottom right corner features buttons for 'Conflicts', 'Manage Overlaps', 'Cancel', and 'Done'.

Maintain Promotion workspace

4. In the Promotion Header pane, edit the enabled fields as necessary.
5. Click **Done** to save any changes and close the workspace.

Associate a deal to a promotion

⇒ **Navigate:** From the Task Pad, select Promotions > Maintain Promotion. The Promotions Search workspace is displayed.

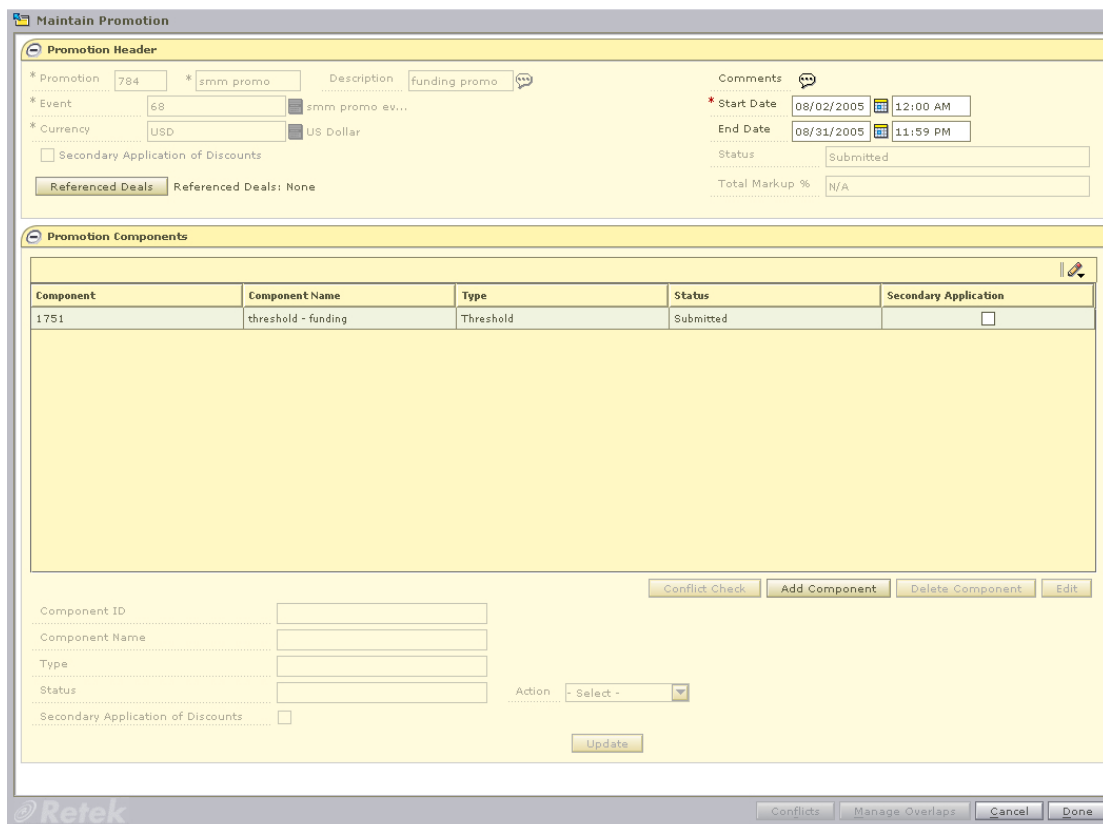


The screenshot shows the 'Promotions Search' workspace. It features a 'Promotion Search Results' pane with a table of results. Below the table are 'Delete' and 'Edit' buttons. At the bottom, there is a 'Promotion Search Criteria' section and a 'Cancel' button.

Promotion	Promotion Name	Start Date	End Date	Status	Theme
752	Test 1	10-14-2004	10-15-2004	Approved *	Apple
755	1	10-14-2004	10-15-2004	Approved	Apple
757	CN-1	10-31-2004	10-31-2005	Worksheet	
758	CN-2	10-31-2004	10-31-2005	Worksheet	
759	smm promo	08-02-2005	08-31-2005	Worksheet	event
760	smm promotion	08-02-2005	08-31-2005	Worksheet	event
763	Corin Date Test	10-01-2004	10-23-2004	Worksheet	Fun

Promotions Search workspace

1. Search for a promotion.
2. In the Promotion Search Results pane, select the promotion you want to edit.
3. Click **Edit**. The Maintain Promotion workspace is displayed.



The screenshot shows the 'Maintain Promotion' workspace. It is divided into two main sections: 'Promotion Header' and 'Promotion Components'.

Promotion Header:

- * Promotion: 784
- * Event: 68
- * Currency: USD
- Description: funding promo
- Comments: [icon]
- * Start Date: 08/02/2005 12:00 AM
- End Date: 08/31/2005 11:59 PM
- Status: Submitted
- Total Markup %: N/A
- Secondary Application of Discounts: ☐
- Referenced Deals: Referenced Deals: None

Promotion Components:

Component	Component Name	Type	Status	Secondary Application
1751	threshold - funding	Threshold	Submitted	<input type="checkbox"/>

Buttons: Conflict Check, Add Component, Delete Component, Edit

Form fields at the bottom:

- Component ID: [text box]
- Component Name: [text box]
- Type: [text box]
- Status: [text box]
- Secondary Application of Discounts: ☐
- Action: [Select - dropdown]
- Update: [button]

Bottom bar: Conflicts, Manage Overlaps, Cancel, Done

Maintain Promotion workspace

4. Click **Referenced Deals**. The Referenced Deals window is displayed

The **Referenced Deals** window is displayed with the following data:

Available Deals						
Deal ID	Deal Type	Vendor Name	Status	Active Date	Close Date	Currency
9802	Promotional	*Nomo Dry S...	Approved	08-31-2001	08-31-2008	euro
9807	Promotional	*Nomo Dry S...	Approved	08-29-2001	08-28-2008	euro
9809	Promotional	*Nomo Dry S...	Approved	08-29-2001	08-27-2008	euro
10109	Promotional	Glassware Pr...	Approved	08-31-2001	08-31-2012	US Dollar
10112	Promotional	Glassware Pr...	Approved	08-31-2001	08-31-2008	US Dollar
10113	Promotional	Glassware Pr...	Approved	08-31-2001	08-31-2010	US Dollar
10114	Promotional	Glassware Pr...	Approved	08-31-2001	08-31-2016	US Dollar
10115	Promotional	Glassware Pr...	Approved	08-31-2001	08-31-2008	US Dollar
10116	Promotional	Glassware Pr...	Approved	08-31-2001	08-31-2008	US Dollar
10118	Promotional	Glassware Pr...	Approved	08-31-2001	08-31-2010	US Dollar

Below the Available Deals table are two arrow buttons: a downward arrow and an upward arrow.

Linked Deals						
Deal ID	Deal Type	Vendor Name	Status	Active Date	Close Date	Currency

At the bottom right of the window are two buttons: **Cancel** and **Select**.

Referenced Deals window

- Select the deals you want to add to the promotion.
- Click **Select**. The window closes.
- Click **Done** to save any changes and close the workspace.

Maintain a promotion event

Overview

Updates can be made to the details of existing promotion events.

Procedures

Maintain a promotion event

⇒ **Navigate:** From the Task Pad, select Promotion Events > Create/Maintain Events. The Maintain Promotion Events workspace is displayed.

Event Id	Event Description	Theme	Start Date	End Date
67	The Never Ending Event		10-31-2004	10-31-2005
73	RF 21 testing	I Don't Know	10-19-2004	10-31-2004
74	Alli Event		11-01-2004	12-01-2005
68	smm promo event	event	08-02-2005	08-31-2005
65	Fall Event	Apple	10-14-2004	10-15-2004
66	Starts today	Fun	10-01-2004	10-23-2004

Maintain Promotion Events workspace

1. Select the event you want to maintain from the table.
2. In the Promotion Events area, edit the enabled fields as necessary.
3. Click **Apply**. Your changes are added to the promotion event and displayed on the table
4. Click **Done** to save any changes and close the window.

Delete a promotion event

⇒ **Navigate:** From the Task Pad, select Promotion Events > Create/Maintain Events. The Maintain Promotion Events workspace is displayed.

Promotion Events

Event Id: 65 Event Description: Fall Event Theme: Apple Start Date & Time: 10/14/2004 12:00 AM End Date & Time: 10/15/2004 11:59 PM

New Apply

Event Id	Event Description	Theme	Start Date	End Date
67	The Never Ending Event		10-31-2004	10-31-2005
73	RF 21 testing	I Don't Know	10-19-2004	10-31-2004
74	Alli Event		11-01-2004	12-01-2005
68	smm promo event	event	08-02-2005	08-31-2005
65	Fall Event	Apple	10-14-2004	10-15-2004
66	Starts today	Fun	10-01-2004	10-23-2004

Delete New Promotion

Retek Cancel Save + Repeat Done

Maintain Promotion Events workspace

1. Select the event you want to delete from the table.
2. Click **Delete**. You are prompted to confirm your decision.
3. Click **Yes**. The record is removed from the table.
4. Click **Done** to close the window.

Maintain a promotion component

Overview



Changes can be made to the details of a promotion component, and new details can be added to promotion components.

In the Promotion Component Detail Maintenance pane, records that contain item/location exceptions or exclusions are indicated by a down arrow. Records that are item/location exceptions or exclusions are indicated by a up arrow.

Procedures

Maintain a promotion component

⇒ **Navigate:** From the Task Pad, select Promotion > Maintain Component. The Maintain Component workspace is displayed.

1. In the Promotion field, enter the ID of the promotion that the component is associated with, or click the LOV  button and select a promotion.
2. In the Component field, enter the ID of the component you want to maintain, or click the LOV  button and select a component.
3. Click **Next**. Additional component maintenance panes are displayed.



Note: Collapse and expand areas and panes to view the information needed to complete the task.


Maintain component details


1. In the Promotion Component Detail Maintenance pane, edit the name of the component as necessary.
2. Enter the consignment rate used for the item while it is on promotion, if necessary.
3. To edit a specific record, select a record, or click **Select All** to make changes to all records on the table.
4. Click **Edit**.
5. Edit the enabled fields as necessary.
6. Click **Apply**.
7. Click **Done** to save any changes and close the workspace.

Delete component details


1. In the Promotion Component Detail Maintenance pane, select the record you want to delete:
 - To edit a specific record, select a record
 - Click **Select All** to make changes to all records on the table.
2. Click **Delete**.
3. You are prompted to confirm your decision.
4. Click **Yes**. The item location is removed from the table.
5. Click **Done** to save any changes and close the workspace.


Define item exceptions and exclusions

1. In the Promotion Component Detail Maintenance pane, select the record for which you want to create an item exception or exclusion. The Item Exceptions and Exclusion pane is displayed.
2. In the Location field, enter a location ID, or click the LOV  button and select a location.

 **Note:** You can only create item exceptions or exclusions for items above the transaction level.
3. Create the exception or exclusion:
 - Click **Create Exceptions** to create an exception to the selected record.
 - Click **Create Exclusion** to create an exclusion.
4. The pane closes. In the Promotion Component Detail Maintenance pane exceptions and exclusions are indicated in the Exclusion/Exception Indicator column:
 - A down arrow indicates that the item/location records contains an exception or exclusion.
 - An up arrow indicates that the item/location records is an exception or exclusion.
5. Click **Done** to save any changes and close the pane.

Define location exceptions and exclusions

1. In the Promotion Component Detail Maintenance pane, select the record for which you want to create a location exception or exclusion. The Location Exceptions and Exclusion pane is displayed.
2. In the Location field, enter a location ID, or click the LOV  button and select a location.

 **Note:** You can only create location exceptions or exclusions for locations at the zone level.
3. Create the exception or exclusion:
 - Click **Create Exceptions** to create an exception to the selected record.
 - Click **Create Exclusions** to create an exclusion.

4. The pane closes. In the Promotion Component Detail Maintenance pane exceptions and exclusions are indicated in the Exclusion/Exception Indicator column:
 - A down arrow indicates that the item/location records that contain an exception or exclusion.
 - An up arrow indicates that the item/location records that is an exception or exclusion.
5. Click **Done** to save any changes and close the pane.

Chapter 7– System options

Define aggregation levels

Overview

The Aggregation Level Settings workspace allows you to define system parameters that vary for price strategies and price worksheet. When a department is created in the merchandising system, Retek Price Management assigns the default value for each parameter to the default or default level defined in the system. You may choose to define the aggregation level at a different parameter than the default. Once these parameters are set, they are not typically changed in the Retek Price Management.

For price strategies, this window allows you to define the lowest merchandise level for which you can create a price strategy.

For price worksheet, this window allows you to define the levels at which certain calculations are performed in the worksheet.

Procedures

Maintain aggregation level settings

⇒ **Navigate:** From the Task Pad, select Aggregation Level > Maintain Aggregation Levels. The Aggregation Level Settings workspace is displayed.

ID	Department Name	Lowest Definable	Worksheet Level	Historical Sales	Regular	Clearance	Promotion	Include WH Inve	Include On order	Price Change Am
22	DW working dept	Department	Department	Week	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Current-New
7777	Retail Dept	Department	Department	Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current-New
7778	Cost Dept	Department	Department	Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current-New
3457	Jap dept	Subclass	Subclass	Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current-New
20	Merch Extract...	Department	Department	Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current-New
1221	Kitchenware	Subclass	Subclass	Half Year	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	New-Current
1234	Glassware	Subclass	Department	Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current-New
7000	DOC Test Dept	Department	Department	Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current-New
7001	DOC Test Dep...	Class	Class	Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current-New
13	SLH Test Dep...	Department	Department	Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current-New
8004	*Women Appa...	Department	Department	Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current-New
1104	*Test Depart...	Department	Department	Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current-New
1704	*Candidate Ru...	Department	Department	Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current-New
8000	djm_dept1	Department	Department	Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current-New
777	*Dairy	Department	Department	Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current-New
1111	*Grocery Non ...	Department	Department	Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current-New
2222	*Deli	Department	Department	Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current-New
6000	*Health&Beauty	Department	Department	Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current-New
6100	General Merch...	Department	Department	Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Current-New

Aggregation Level Settings workspace

1. Select the record you want to update.
2. Click in the field that you want to change.
 - **Lowest Definable Level:** Select the lowest level of the merchandise hierarchy for which a price strategy can be defined.
 - **Worksheet Level:** Select the level of the merchandise hierarchy at which totals are calculated.
 - **Historical Sales:** Select how often sales are reviewed.
 - **Regular:** Select the check box to indicate that regular sales are calculated on the price worksheet.
 - **Clearance:** Select the check box to indicate that clearance sales are calculated on the price worksheet.
 - **Promotion:** Select the check box to indicate that promotional sales are calculated on the price worksheet.
 - **Include WH Inventory:** Select the check box to indicate that warehouse inventory is included on the price worksheet.
 - **Include On Order In Sell Thru:** Select the check box to indicate that inventory ordered is included on the price worksheet.
 - **Price Change Amount Calc:** Select the method of calculating the price change amount on the price worksheet.
 - **New-Current:** The current price is subtracted from the new price.
 - **Current-New:** The new price is subtracted from the current price
3. Click **Done** to save any changes and close the workspace.

Define system defaults

Overview

The System Defaults Edit workspace allows you to configure RPM to maximize the system for your company. System defaults are the values used in your system to help the users save time without having to specify or select certain values that do not vary. The values entered will appear in other areas of the application.

Procedures

Edit system defaults

⇒ **Navigate:** From Task Pad, select System Options > System Defaults Edit. The System Defaults Edit workspace is displayed.

The screenshot shows the 'System Defaults Edit' workspace. It contains a 'Defaults' section with the following fields:

- * Lead Item Calculation Type: Margin
- * Pricing Strategy: Clearance
- * Protect Setting: ☒
- * Currency: USD (US Dollar)
- * Price Change Item Level: Transaction Level Item
- Price Change Diff Type: Size
- * Price Change Type: Change By Amount

The Retek logo is visible in the bottom left corner, and 'Cancel' and 'Save' buttons are in the bottom right corner.

System Defaults Edit workspace

1. Update enabled fields as necessary.
2. Click **Save** to commit any changes and close the workspace.

View system defaults

⇒ **Navigate:** From Task Pad, select System Options > System Defaults View. The System Defaults View workspace is displayed.

The screenshot shows the 'System Defaults View' window. It has a title bar with the text 'System Defaults View'. Below the title bar is a yellow header area with a 'Defaults' tab. The main content area is white and contains several settings:

* Lead Item Calculation Type	Margin	* Price Change Item Level	Transaction Level Item
* Pricing Strategy	Clearance	Price Change Diff Type	Size
* Protect Setting	<input checked="" type="checkbox"/>	* Price Change Type	Change By Amount
* Currency	USD <input type="checkbox"/> US Dollar		

At the bottom left of the window is the Retek logo, and at the bottom right is a 'Close' button.

System Defaults View workspace

- Click **Close** to exit the workspace.

Define system options

Overview

The system options workspace allows you to configure RPM to maximize the system for your company. System options allow you to customize various parameters, defaults, and constants that are used throughout the system. Normally, these elements are set when RPM is installed by the system or database administrator. They tend to remain fixed unless a business practice is changed which necessitates a change in RPM. System options are the values used in your system that define the overall configuration of the system.

Procedures

Edit system options

⇒ **Navigate:** From Task Pad, select System Options > System Options Edit. The System Options workspace is displayed.

The screenshot shows the 'System Options' workspace with a yellow background. It contains two columns of options, each with a red asterisk indicating it is a system option. The options are as follows:

Option	Value
* Sales Calculation Method	Smoothed Average Sales
* Update Item Attributes	<input checked="" type="checkbox"/>
* Cost Calculation Method	Highest Location Cost
* Recognize WHs as Locations	<input checked="" type="checkbox"/>
* Open Zone Use	<input type="checkbox"/>
* Purge Reset Clearance Months	1
* # of Days Rejects Held	30
* Promotion # Days Rejects Held	30
* Promotion History Months	6
* Event Id Required	<input checked="" type="checkbox"/>
* Zone/Parent Ranging	<input checked="" type="checkbox"/>
* Location Move Lead Time	1
* Multiple Item/Loc Promotions	<input checked="" type="checkbox"/>
* Price Change/Promotion Overlaps	<input checked="" type="checkbox"/>
* Clearance/Promotion Overlaps	<input checked="" type="checkbox"/>
* Allow Complex Promotions	<input checked="" type="checkbox"/>
Exact Deal / Funded Promotion Dates	<input type="checkbox"/>
* Default Out of Stock Days	120
* Default Reset Date	<input checked="" type="checkbox"/>
* Price Change Processing Days	1
* Ends In Digits For Zero Dedimal Currencies	0
External Prices Allowed	<input checked="" type="checkbox"/>
Apply Promo Change Type 1st	Amount Off

The Retek logo is visible in the bottom left corner, and 'Cancel' and 'Save' buttons are in the bottom right corner.

System Options workspace

1. Update any enabled fields as necessary.
2. Click **Save** to commit any changes and close the workspace.

View system options

⇒ **Navigate:** From Task Pad, select System Options > System Options View. The System Options View workspace is displayed.

Options	
* Sales Calculation Method	Smoothed Average Sales
* Update Item Attributes	<input checked="" type="checkbox"/>
* Cost Calculation Method	Highest Location Cost
* Recognize WHs as Locations	<input checked="" type="checkbox"/>
* Open Zone Use	<input type="checkbox"/>
* Purge Reset Clearance Months	1
* # of Days Rejects Held	30
* Promotion # Days Rejects Held	30
* Promotion History Months	6
* Event Id Required	<input checked="" type="checkbox"/>
* Zone/Parent Ranging	<input checked="" type="checkbox"/>
* Location Move Lead Time	1
* Multiple Item/Loc Promotions	<input checked="" type="checkbox"/>
* Price Change/Promotion Overlaps	<input checked="" type="checkbox"/>
* Clearance/Promotion Overlaps	<input checked="" type="checkbox"/>
* Allow Complex Promotions	<input checked="" type="checkbox"/>
* Exact Deal / Funded Promotion Dates	<input type="checkbox"/>
* Default Out of Stock Days	120
* Default Reset Date	<input checked="" type="checkbox"/>
* Price Change Processing Days	1
* Ends In Digits For Zero Decimal Currencies	0
* External Prices Allowed	<input checked="" type="checkbox"/>
* Apply Promo Change Type 1st	Amount Off

System Options View workspace

- Click **Close** to exit the workspace.

Maintain codes

Overview

The foundation area allows you to maintain reason codes and link codes. Reason codes are used to explain the rationale for clearances and price changes. Link codes are used to associate items to each other at a location and price them exactly the same.

Procedures

Create a code

⇒ **Navigate:** From the Task Pad, select Foundation > Code Maintenance. The Code Maintenance workspace is displayed.

The screenshot shows the 'Code Maintenance' workspace. It features a table with four columns: Type, Code, Description, and SIM. The table contains various code entries, including Link Codes, Regular Prices, Clearance Prices, and Regular System Prices. A 'New' button is located at the bottom right of the table area, and a 'Delete' button is next to it. The Retek logo is visible in the bottom left corner of the workspace.

Type	Code	Description	SIM
Link Code	Code	LaLa	
Regular Price	RegCodeNew	newDesc	<input type="radio"/>
Regular Price	Code 46	Andy Dufresne	<input checked="" type="radio"/>
Link Code	yogurt	Code used for all snack size yogurt	
Link Code	Pizza	Code used for all frozen pizzas	
Regular Price	Code 2	Alli Code	<input type="radio"/>
Clearance Price	Code Clear	Summer Everything Clearance	<input type="radio"/>
Clearance Price	Code Blue	Code Blue Sale???	<input checked="" type="radio"/>
Regular System Price	AREADIFF	Area Differential generated Price Change	
Regular Price	SIMREG	Externally generated Price Change	<input checked="" type="radio"/>
Clearance Price	SIMCLEAR	Externally generated Clearance	<input type="radio"/>
Regular Price	SMM code	SMM code description	<input type="radio"/>
Regular Price	1	Coding the Impossible...	<input type="radio"/>
Clearance Price	SH3-RT	Reg Test	<input type="radio"/>
Link Code	Milk candy	Milk candy is tasty	
Clearance Price	SH-Reg-T	Reg Test	<input type="radio"/>
Clearance Price	SH2-R-T	Reg Test2	<input type="radio"/>
Clearance Price	5-2	Clearance Reason Code	<input type="radio"/>

Code Maintenance workspace

1. Click **New**. The next line on the table is enabled.
2. In the Type field, select the type of code you are creating.
3. In the Code field, enter a unique identifier for the code.
4. In the Description field, enter a description of the code.
5. Click **Done** to save any changes and close the workspace.

Edit a code

⇒ **Navigate:** From the Task Pad, select Foundation > Code Maintenance. The Code Maintenance workspace is displayed.

Type	Code	Description	SIM
Link Code	Code	LaLa	
Regular Price	RegCodeNew	newDesc	<input type="radio"/>
Regular Price	Code 46	Andy Dufresne	<input checked="" type="radio"/>
Link Code	yogurt	Code used for all snack size yogurt	
Link Code	Pizza	Code used for all frozen pizzas	
Regular Price	Code 2	Alli Code	<input type="radio"/>
Clearance Price	Code Clear	Summer Everything Clearance	<input type="radio"/>
Clearance Price	Code Blue	Code Blue Sale???	<input checked="" type="radio"/>
Regular System Price	AREADIFF	Area Differential generated Price Change	
Regular Price	SIMREG	Externally generated Price Change	<input checked="" type="radio"/>
Clearance Price	SIMCLEAR	Externally generated Clearance	<input type="radio"/>
Regular Price	SMM code	SMM code description	<input type="radio"/>
Regular Price	1	Coding the Impossible...	<input type="radio"/>
Clearance Price	SH3-RT	Reg Test	<input type="radio"/>
Link Code	Milk candy	Milk candy is tasty	
Clearance Price	SH-Reg-T	Reg Test	<input type="radio"/>
Clearance Price	SH2-R-T	Reg Test2	<input type="radio"/>
Clearance Price	S-2	Clearance Reason Code	<input type="radio"/>

Buttons: New, Delete, Cancel, Save + Repeat, Done

Code Maintenance workspace

1. Double click in the field you want to edit.
2. Make necessary changes.
3. In the SIM field, select the radio button to indicate that the reason code is used for Store Inventory Management (SIM).

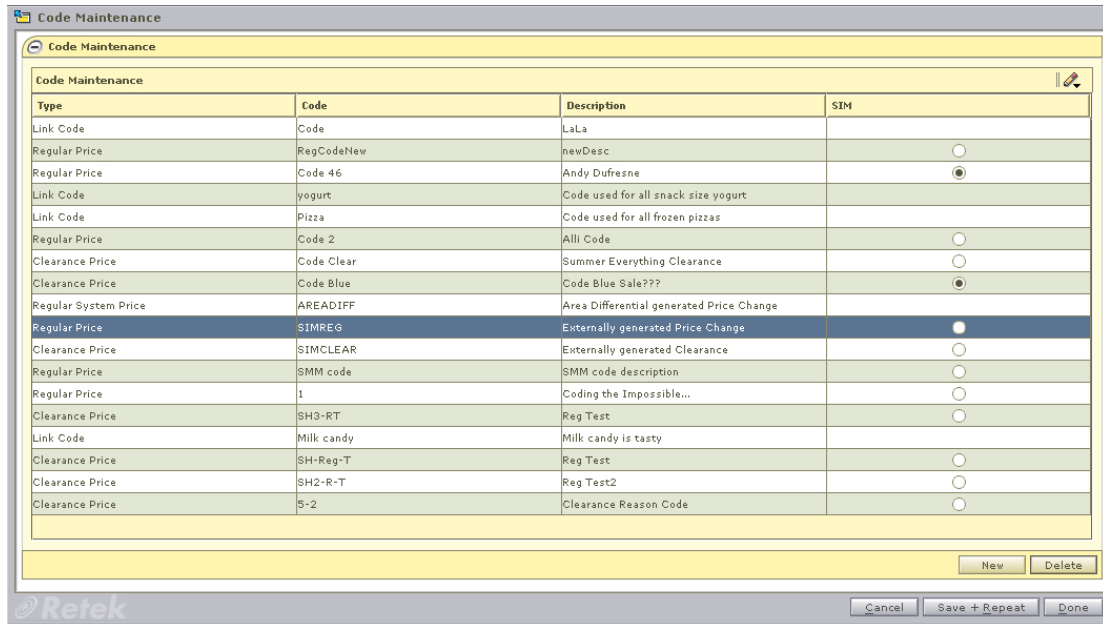


Note: Only one reason code for price changes and clearances can be assigned as a SIM reason code. You are prompted to confirm your choice to change the SIM reason code.

4. Click **Save + Repeat** to commit your changes.
5. Click **Done** to save any changes and close the workspace.

Delete a code

⇒ **Navigate:** From the Task Pad, select Foundation > Code Maintenance. The Code Maintenance workspace is displayed.



Code Maintenance workspace

1. Select the record you want to delete.
2. Click **Delete**. The record is removed from the table.



Note: You cannot delete a reason code that is in use.

3. Click **Done** to close the window.

Chapter 8 – Set up pricing

Define price guides

Overview

A price guide allows you to create a uniform price strategy. You can use them to maintain a consistent price points. You can determine if the prices in a guide should be rounded in the same manner or if they should all end in the same digits.

Price guides can be set up at the corporate level or at the department level. A corporate level price guide is created and maintained at the corporate level, but can be referenced by many departments. If any changes are made to a corporate price guide all departments that are linked to the corporate guide will reflect the updated changes. A department-level price guide is created and maintained at the department level.


Price guides are used when creating the primary zone group for a merchandise level. When a price guide is attached to a primary zone group definition, it will be applied to the initial prices proposed by RPM during the initial price setting process in RMS (if the proposed price falls within one of the defined intervals on the guide).

Procedures

Create a price guide

⇒ **Navigate:** From the Task Pad, select Price Guides > Create Price Guide. The Create Price Guide workspace is displayed.

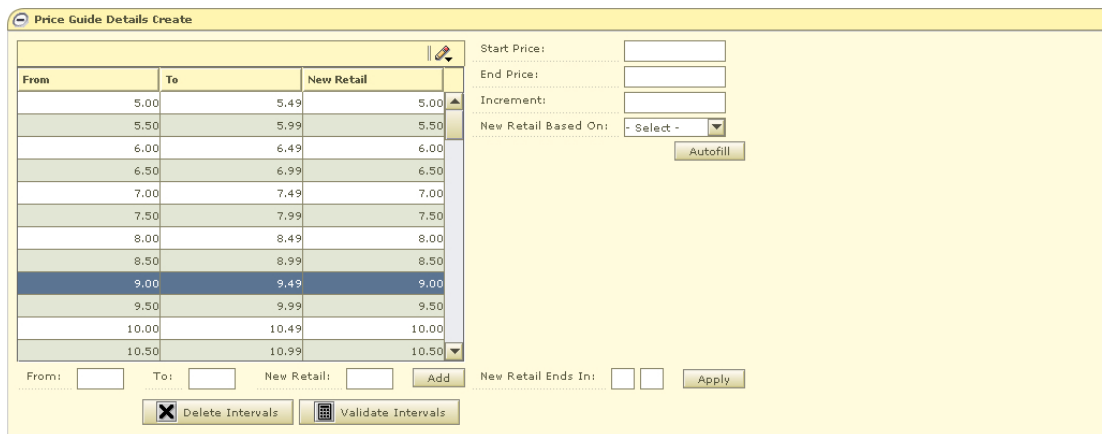
Create Price Guide workspace

1. In the Price Guide Type field, select the type of price guide you are creating.
2. In the Name field, enter the name of the price guide.
3. In the Description field, enter a description of the price guide.
4. In the Department field, enter the ID of the department, or click the LOV  button and select a department.



Note: This field is available only if you selected Department in the Price Guide Type field.

5. In the Currency field, select the currency for the price guide.
6. Click **Add Details**. The Price Guide Details Create pane is displayed.



The screenshot shows the 'Price Guide Details Create' pane. It features a table with columns 'From', 'To', and 'New Retail'. The table contains 11 rows of data, with the 9th row (9.00 to 9.49) highlighted. To the right of the table are input fields for 'Start Price', 'End Price', 'Increment', and 'New Retail Based On' (a dropdown menu). Below these fields is an 'Autofill' button. At the bottom of the pane, there are input fields for 'From', 'To', 'New Retail', and 'New Retail Ends In', along with 'Add', 'Delete Intervals', and 'Validate Intervals' buttons.

From	To	New Retail
5.00	5.49	5.00
5.50	5.99	5.50
6.00	6.49	6.00
6.50	6.99	6.50
7.00	7.49	7.00
7.50	7.99	7.50
8.00	8.49	8.00
8.50	8.99	8.50
9.00	9.49	9.00
9.50	9.99	9.50
10.00	10.49	10.00
10.50	10.99	10.50

Price Guide Details Create pane

Add price intervals individually

1. In the From field, enter the low price of the interval.
2. In the To field, enter the high price of the interval.



Note: The value in the From field must be lower than the value in the To field.

3. In the New Retail field, enter the price that all values in the interval adjust to.
4. Click **Add**. The information is added to the table.

Add multiple price intervals

1. In the Start Price field, enter the low price of the interval.
2. In the End Price field, enter the high price of the interval.
3. In the Increment field, enter the amount each level should increase by.

4. In the New Retail Based On field, select how the new retail price should be determined:
 - **From Price:** The new price will be set to the same value as the value in the From column on the list of intervals.
 - **To Price:** The new price will be set to the same value as the value in the To column on the list of intervals.
 - **Average Price:** The new retail will be set to the average value of values in the From and To columns on the list of intervals.
5. Click **Autofill**. The information is added to the table.



Note: If the End Price is not divisible by the value in the Increment field, RPM will suggest the last valid price in the range. Click **Yes** to accept the price and continue, or **No** to cancel the process.

Define ends in values

1. Select the intervals you want to add an ends in value.
2. In the New Retail Ends In field, enter the digits the price ends in.



Note: The number of fields available are determined at system set up. If your currency uses decimals the number of fields corresponds to the number of decimals used in the currency. If you currency does not use decimals, the number of digits is determined at system set up.

3. Click **Apply**. The New Retail field on the selected intervals in the table are updated with the Ends In Digits specified by the user.

Complete the price guide

- Click **Done** to save any changes close the workspace.

Maintain a price guide

- ⇒ **Navigate:** From the Price Guides menu, select Maintain Price Guide. The Price Guides Maintenance workspace is displayed.

The screenshot shows the 'Price Guides Maintenance' workspace. At the top, there's a 'Pricing Guides List' section. Below it is a table with columns: Guide Type, Name, Description, Dept., Currency, and Linked. The table contains several rows of pricing guides. The last row is highlighted in blue. At the bottom right of the table, there are 'Delete' and 'Edit' buttons. At the very bottom of the workspace, there are 'Cancel', 'Save + Repeat', and 'Done' buttons.

Guide Type	Name	Description	Dept.	Currency	Linked
Filter by:			Filter by:		
Department	Corin's Rockin PG	Sweetness	8001 - *Meat	USD	
Department	Huh?	What?	1704 - *Candidate Rules Dep	USD	
Department	PG for PC & Clear Testing	PG for PC & Clear Testing	1704 - *Candidate Rules Dep	USD	
Department	PG Diff cur (AUD)	AUD	1704 - *Candidate Rules Dep	AUD	
Corporate	Jodi's 2nd copy	Jodi's 2nd copy		USD	
Department	Jodi's 2nd copy	Jodi's 2nd copy	1221 - Kitchenware	USD	

Price Guides Maintenance workspace

1. Select the price guide you want to edit.



Note: Linked department price guides cannot be edited. They can only be viewed. The details of a linked department price guide are owned at the corporate level, so changes must be made to the corporate price guide.

2. Click **Edit**. The Price Guide Maintenance Details pane is displayed.

Price Guide Maintenance Details

* Name: le nom

* Description: c'est le description ça

* Department: 7001 +DOC Test Dept. 2

* Currency: USD US Dollar

From	To	New Retail
100.00	104.99	100.00
105.00	109.99	105.00
110.00	114.99	110.00
115.00	119.99	115.00
120.00	124.99	120.00
125.00	129.99	125.00
130.00	134.99	130.00
135.00	139.99	135.00
140.00	144.99	140.00
145.00	149.99	145.00

Start Price:

End Price:

Increment:

New Retail Based On: - Select -

Autofill

From: To: New Retail: Add

New Retail Ends In: Apply

Delete Intervals Validate Intervals

Price Guide Maintenance Details pane

3. Edit the enabled fields as necessary.
4. Update the intervals as necessary.
 - Add price intervals individually.
 - Add multiple price intervals.
 - Define the ends in price.
5. To delete an interval:
 - a. Select the intervals you want to delete.
 - b. Click **Delete Intervals**. The intervals are removed from the table.
6. To verify the intervals are sequential:
 - a. Click **Verify Intervals**. If non-sequential intervals exist, an error message is displayed.
 - b. Click **OK**. The non-sequential values are highlighted in red.
 - c. Correct the intervals as necessary.
 - Add price intervals individually.
 - Delete an interval.
7. Click **Done** to save any changes and close the workspace.

Copy a price guide

⇒ **Navigate:** From the Price Guides menu, select Copy Price Guide. The Copy Price Guide workspace is displayed.

Pricing Guides Origin

☒ Corporate Pricing Guides
☐ Department Pricing Guides

Pricing Guides Destination

☒ Corporate Pricing Guides
☐ Department Pricing Guides



Create Copy Price Guide

Guide Type	Name	Description	Dept.	Currency	Linked
Corporate	Jedi's 2nd copy	Jedi's 2nd copy		USD	<input checked="" type="checkbox"/>
Corporate	HL-corporate	HL-corporate		USD	<input checked="" type="checkbox"/>
Corporate	foo	foo		USD	
Corporate	SLH guide	test guide		USD	
Corporate	DW Corp Guide	Prices so low we call it crazy ...		USD	
Corporate	corin's corporate	hi		USD	<input checked="" type="checkbox"/>

Copy

Cancel Save + Repeat Done

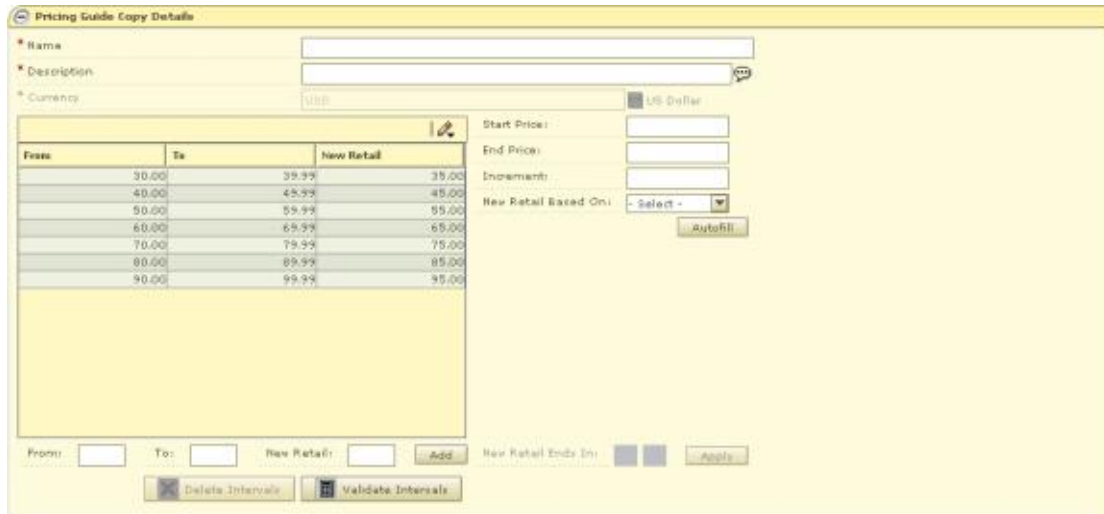
Copy Price Guide workspace

- In the Price Guides Origin pane, select the price guide type of the price guide you are copying.
 - If you select Department Pricing Guides, enter the department ID in the field to the right, or click the LOV  button and select a department.
- In the Price Guides Destination pane, select the price guide type of the price guide you are creating.
 - If you select Department Pricing Guides, enter the department ID in the field to the right, or click the LOV  button and select a department.



Note: Price guides that match the criteria entered are displayed in the Create Copy Price Guide container.

3. In the Create Copy Price Guide container, select the price guide you want to copy.
4. Click **Copy**. The Pricing Guide Copy Details pane is displayed.



The screenshot shows the 'Pricing Guide Copy Details' window. It contains several input fields and a table. The 'Name' and 'Description' fields are empty. The 'Currency' is set to 'USD'. The 'Start Price' is 35.00, 'End Price' is 45.00, and 'Increment' is 10.00. The 'New Retail Based On' dropdown is set to 'Select'. The 'Autofill' button is visible. The table below shows the 'From', 'To', and 'New Retail' values for each interval.

From	To	New Retail
30.00	39.99	35.00
40.00	49.99	45.00
50.00	59.99	55.00
60.00	69.99	65.00
70.00	79.99	75.00
80.00	89.99	85.00
90.00	99.99	95.00

At the bottom, there are 'From', 'To', and 'New Retail' input fields, an 'Add' button, and a 'New Retail Ends In' dropdown. There are also 'Delete Intervals' and 'Validate Intervals' buttons.

Pricing Guide Copy Details pane

5. Maintain the price guide as necessary.
6. Click **Done** to save any changes and close the workspace.

Link a price guide

⇒ **Navigate:** From the Price Guides menu, select Link Price Guide. The Link Price Guide workspace is displayed.

Link Price Guide

Department To Link

Department: 7000 +DOC Test Dept

Price Guides List

Name	Description	Currency	Linked
Jodi's 2nd copy	Jodi's 2nd copy	USD	<input checked="" type="checkbox"/>
HL-corporate	HL-corporate	USD	<input checked="" type="checkbox"/>
foo	foo	USD	<input type="checkbox"/>
SLH guide	test guide	USD	<input type="checkbox"/>
DW Corp Guide	Prices so low we ca...	USD	<input type="checkbox"/>
corin's corporate	hi	USD	<input checked="" type="checkbox"/>
Jodi's Corp Price G...	Jodi's Corporate Pr...	USD	<input checked="" type="checkbox"/>

Link

Cancel Save + Repeat Done

Link Price Guide workspace

1. In the Department field, enter the ID of the department you want to link to a corporate price guide.
2. In the Price Guides List container, select the corporate price guide you want to link to.
3. Click **Link**. A red X appears in the Linked column, indicating the corporate price guide has been linked.
4. Click **Done** to save any changes close the workspace.

Set up pricing attributes

Overview

The pricing attributes area allows you to assign market baskets codes and link codes to an item/location. The items can be associated to the code through the merchandise hierarchy, at the item level, through item attributes such as diff or diff type, or zones.

Procedures

Search for pricing attributes

- ⇒ **Navigate:** From the Task Pad, select Pricing Attributes > Maintain Pricing Attributes. The Maintain Pricing Attributes workspace is displayed.

Maintain Pricing Attributes workspace

1. In the Pricing Attributes Search pane, Enter criteria as necessary to restrict the search to the values you want to maintain.



Note: You must enter at least one criterion to search.

2. Click **Search**. Your results are displayed in the Maintain Pricing Attributes pane.

Item	Item Description	Location	Location Description	Market Basket Code	Link Code	Link Code Description
100058031	jk Deal Test Item #2	1000000001	Minneapolis			
100058031	jk Deal Test Item #2	1000000015	Washington DC			
100042005	jk Really Great Blender	1000000001	Minneapolis			
100042005	jk Really Great Blender	1000000015	Washington DC			
100043008	jk Really Great but Expe...	1000000001	Minneapolis			
100043008	jk Really Great but Expe...	1000000015	Washington DC			
100057012	jk Deal Test Item	1000000001	Minneapolis			
100057012	jk Deal Test Item	1000000015	Washington DC			
100110004	IDR: reg item	1000000001	Minneapolis			
100110004	IDR: reg item	1000000015	Washington DC			
100110004	IDR: reg item	111	ALL Virtual			

Maintain Pricing Attributes pane

Edit pricing attributes

- ⇒ **Navigate:** From the Task Pad, select Pricing Attributes > Maintain Pricing Attributes. The Maintain Pricing Attributes workspace is displayed.

The screenshot shows the 'Maintain Pricing Attributes' workspace. At the top is a 'Pricing Attributes Search' section with various input fields: Department, Class, Subclass, Item Type (dropdown), Item Level (dropdown), Diff Type (dropdown), Item, Diff, Zone Group, Zone, Location, Market Basket Code, and Link Code. Each field has a small icon with a plus sign. At the bottom right of the search section are 'Search' and 'Reset' buttons. The bottom of the workspace has a Retek logo and 'Cancel', 'Save + Repeat', and 'Done' buttons.


Maintain Pricing Attributes workspace

1. Search for and retrieve a pricing attribute. Your results are displayed in the Maintain Pricing Attributes pane.

The screenshot shows the 'Maintain Pricing Attributes' workspace with a table of results. The table has columns: Item, Item Description, Location, Location Description, Market Basket Code, Link Code, and Link Code Description. Below the table are checkboxes for 'Remove Market Basket Code' and 'Remove Link Code', followed by input fields for 'Market Basket Code' and 'Link Code'. An 'Apply' button is at the bottom right.

Item	Item Description	Location	Location Description	Market Basket Code	Link Code	Link Code Description
100058031	jk Deal Test Item #2	1000000001	Minneapolis			
100058031	jk Deal Test Item #2	1000000015	Washington DC			
100042005	jk Really Great Blender	1000000001	Minneapolis			
100042005	jk Really Great Blender	1000000015	Washington DC			
100043008	jk Really Great but Expe...	1000000001	Minneapolis			
100043008	jk Really Great but Expe...	1000000015	Washington DC			
100057012	jk Deal Test Item	1000000001	Minneapolis			
100057012	jk Deal Test Item	1000000015	Washington DC			
100110004	IDR: reg item	1000000001	Minneapolis			
100110004	IDR: reg item	1000000015	Washington DC			
100110004	IDR: reg item	111	ALL Virtual			

Maintain Pricing Attributes pane

2. Select the record you want to edit.
3. In the Market Basket Code field or Link Code field, enter the ID of the code, or click the LOV  button and select a code.
4. Click **Apply**. Your changes are added to the table.
5. Click **Done** to save any changes and close the workspace.

Delete a code from a record

⇒ **Navigate:** From the Task Pad, select Pricing Attributes > Maintain Pricing Attributes. The Maintain Pricing Attributes workspace is displayed.

The screenshot shows the 'Maintain Pricing Attributes' workspace. At the top is the 'Pricing Attributes Search' pane with various input fields: Department, Class, Subclass, Item Type (dropdown), Item Level (dropdown), Diff Type (dropdown), Item, Diff, Zone Group, Zone, Location, Market Basket Code, and Link Code. Each field has a small icon with a plus sign. At the bottom of the search pane are 'Search' and 'Reset' buttons. The main workspace area below is empty, with 'Cancel', 'Save + Repeat', and 'Done' buttons at the bottom right.

Maintain Pricing Attributes workspace

1. Search for and retrieve a pricing attribute. Your results are displayed in the Maintain Pricing Attributes pane.

The screenshot shows the 'Maintain Pricing Attributes' workspace with a table of results. The table has the following columns: Item, Item Description, Location, Location Description, Market Basket Code, Link Code, and Link Code Description. Below the table are checkboxes for 'Remove Market Basket Code' and 'Remove Link Code', each followed by an input field for the code to be removed. An 'Apply' button is at the bottom right.

Item	Item Description	Location	Location Description	Market Basket Code	Link Code	Link Code Description
100058031	jk Deal Test Item #2	1000000001	Minneapolis			
100058031	jk Deal Test Item #2	1000000015	Washington DC			
100042005	jk Really Great Blender	1000000001	Minneapolis			
100042005	jk Really Great Blender	1000000015	Washington DC			
100043008	jk Really Great but Expe...	1000000001	Minneapolis			
100043008	jk Really Great but Expe...	1000000015	Washington DC			
100057012	jk Deal Test Item	1000000001	Minneapolis			
100057012	jk Deal Test Item	1000000015	Washington DC			
100110004	IDR: reg item	1000000001	Minneapolis			
100110004	IDR: reg item	1000000015	Washington DC			
100110004	IDR: reg item	111	ALL Virtual			

Maintain Pricing Attributes pane

2. Select the record from which you want to delete the code.
3. Select the Remove Market Basket Code or Remove Link Code check box.
4. Click **Apply**. Your changes are added to the table.
5. Click **Done** to save any changes and close the workspace.

Set up zone structure

Overview

Zone structures allow you to group locations in order to set the initial price of items. Additionally, you identify the types of pricing the zone is used for; Regular, Promotional, or Clearance. There are several components that you need to define in order to use zone structures.

Zone groups

Zone groups are a collection of zones. You can define multiple zone groups that are suited to your business. After you define the zone group, you can define the zones in the zone group. Multiple currencies may exist within a zone group.

Zones

A zone is a group of locations that are priced the same within a zone group. Locations within a zone must have the same currency. Not all locations must be assigned to a zone.

Primary zone groups

The primary zone group is used to determine how to items are initially priced in RMS. When you create a primary zone group, you identify the merchandise hierarchy level, the zone group, the markup percent, the markup type, and the price guide. The merchandise hierarchy assigned to a new item in RMS will determine the primary zone group definition in RPM used to initially price the item. Based on the information associated with the primary zone group and the cost of the item, as entered in RMS, prices will be proposed.

Procedures

Create a zone group

⇒ **Navigate:** From the Task Pad, select Zone Structure > Create Zone Group. The Create Zone Group workspace is displayed.

The screenshot shows the 'Create Zone Group' workspace. It features a form with the following fields and controls:


- Zone Group ID:** A text field containing '451'.
- Zone Group Name:** A text field containing 'Zone'.
- Type:** A dropdown menu set to 'Regular'.
- Like Group:** A checkbox that is currently unchecked.
- Next:** A button to proceed to the next step.
- Zone ID:** A text field containing '659'.
- Zone Name:** An empty text field.
- Currency:** An empty text field with a small icon to its right.
- Apply:** A button to apply the changes.
- Table:** A table with the following columns: Zone ID, Name, Currency, Location Count, and Base. The table body is currently empty.
- Buttons:** At the bottom right, there are buttons for 'Save', 'Locations', 'Delete', 'Cancel', 'Save + Repeat', and 'Done'.

Create Zone Group workspace

1. In the Zone Group ID field, edit the Zone Group ID field as necessary.



Note: The Zone Group ID field displays with the next available number. If you choose to update the field, you must choose a unique ID.


2. In the Zone Group Name field, enter a description of the zone group.
3. In the Type field, enter the type of pricing this zone group is used for, or click the LOV  button and select a type.
4. Click **Next**. Your zone group is created.

Add zones to a zone group

1. In the Zone ID field, edit the Zone Group ID field as necessary.

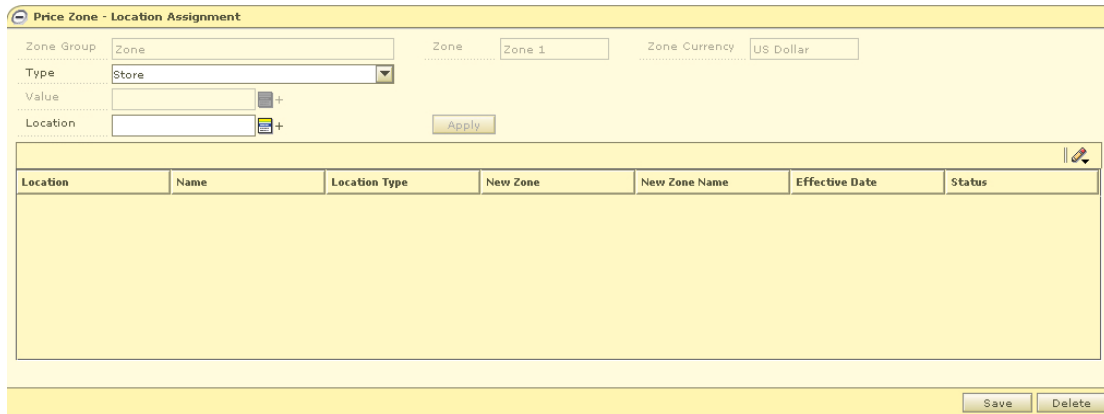


Note: The Zone ID field displays with the next available number. If you choose to update the field, you must choose a unique ID.

2. In the Zone Name field, enter a description of the zone.
3. In the Currency field, enter the currency for the zone, or click the LOV  button and select a currency.
4. Click **Apply**. Your zone is added to the table.
5. Add the appropriate number of zones for your zone group.


Add locations to a zone

1. Select a zone.
2. Click **Locations**. The Price Zone – Location Assignment pane is displayed.



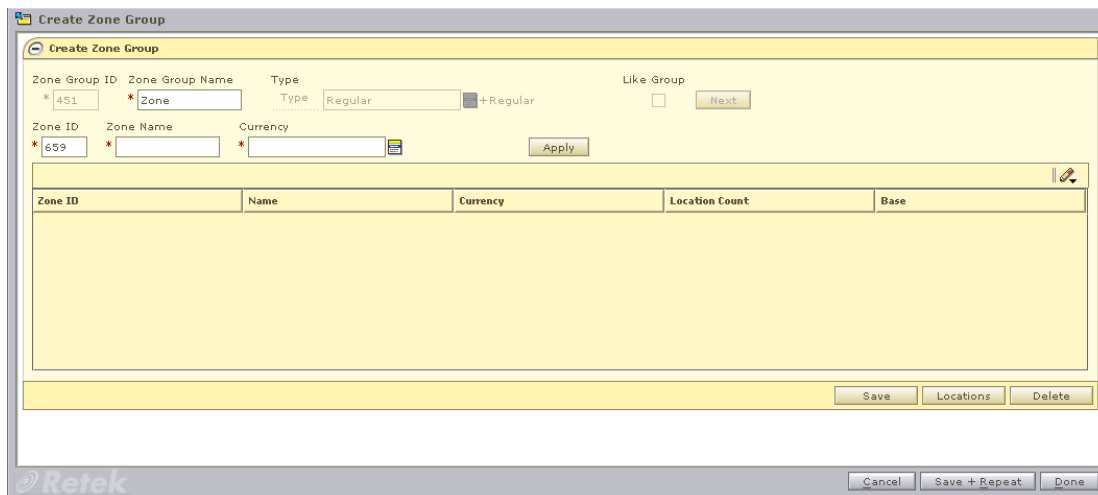
The screenshot shows the 'Price Zone - Location Assignment' pane. It includes fields for 'Zone Group' (set to 'Zone'), 'Zone' (set to 'Zone 1'), and 'Zone Currency' (set to 'US Dollar'). Below these are 'Type' (set to 'Store'), 'Value' (with a '+' button), and 'Location' (with a '+' button). An 'Apply' button is located to the right of the 'Location' field. Below the form is a table with the following columns: Location, Name, Location Type, New Zone, New Zone Name, Effective Date, and Status. The table is currently empty. At the bottom right, there are 'Save' and 'Delete' buttons.

Price Zone – Location Assignment pane

3. In the first field, select the type of location you want to add to the zone.
4. In the Value field, enter the ID of the location or location group, or click the LOV  button and select a location or location group.
5. Click **Apply** to add the location or location group to the list of locations.
6. Click **Save** to commit any changes.
7. Click **Done** to save any changes and close the workspace.

Copy an existing zone group

- ⇒ **Navigate:** From the Task Pad, select Zone Structure > Create Zone Group. The Create Zone Group workspace is displayed.



The screenshot shows the 'Create Zone Group' workspace. It includes fields for 'Zone Group ID' (with a value of 451), 'Zone Group Name' (with a value of 'Zone'), 'Type' (set to 'Regular'), and 'Like Group' (with a 'Next' button). Below these are 'Zone ID' (with a value of 659), 'Zone Name' (with a value of '*'), and 'Currency' (with a value of '*'). An 'Apply' button is located to the right of the 'Currency' field. Below the form is a table with the following columns: Zone ID, Name, Currency, Location Count, and Base. The table is currently empty. At the bottom right, there are 'Save', 'Locations', and 'Delete' buttons. At the bottom left, there is a 'Retek' logo. At the bottom right, there are 'Cancel', 'Save + Repeat', and 'Done' buttons.

Create Zone Group workspace

1. In the Zone Group ID field, edit the Zone Group ID field as necessary.



Note: The Zone Group ID field displays with the next available number. If you choose to update the field, you must choose a unique ID.

2. In the Zone Group Name field, enter a description of the zone group.
3. In the Type field, enter the pricing strategy that the zone group will use, or click the LOV button and select a type.
4. Select the Like Group check box.
5. Click **Next**. The Like Group container is displayed.
6. Enter the ID of the zone group that you want to copy, or click the LOV button and select a group.
7. Click **Done** to save any changes and close the workspace.



Note: To edit the newly created Zone Group, see the Maintain a zone group procedure.

Maintain a zone group

- ⇒ **Navigate:** From the Task Pad, select Zone Structure > Maintain Zone Group. The Maintain Zone Group workspace is displayed.

Zone Group ID	Name	Type	Location Count
119	DW currency	Regular	7
130	SLH	Regular	3
131	DW USD	Regular	3
184	Jodi's 1221 ZG	Regular	3
199	ZG-0009	Clearance; Regular; Promotion	2
393	1221 Warehouses	Regular	8
402	corin test	Regular	1

Maintain Zone Group workspace

1. Filter for the records as necessary:
 - a. In the Location, Currency, and Type fields, enter the ID of the criteria you want to filter for, or click the LOV button and select a criteria.
 - b. Click the filter button. Zone groups that match your criteria are displayed in the table below.

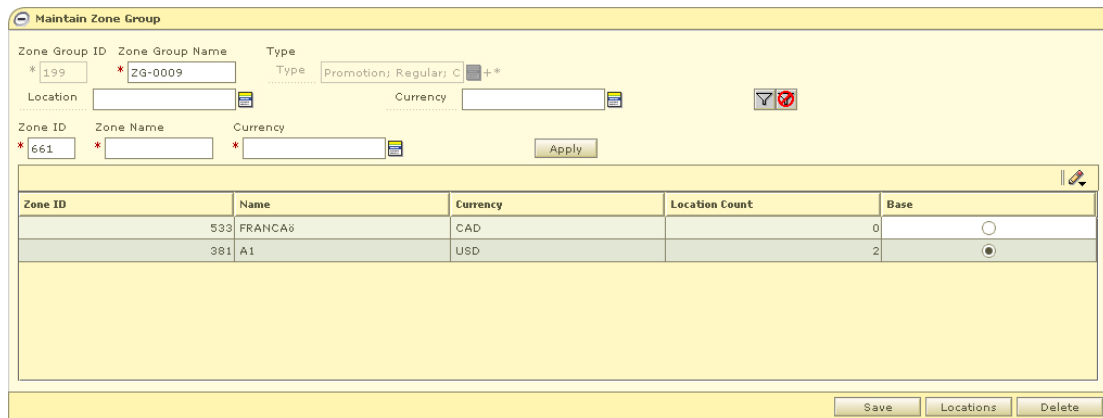


Note: Click the clear filter button to remove the filter criteria. All zone groups are displayed in the table below.

2. To delete a zone group:
 - a. Select a zone group.
 - b. Click **Delete**. The zone group, zones, and locations are removed.

Edit zones

1. Select a zone group.
2. Click **Edit**. The Maintain Zone Group pane is displayed.



The screenshot shows the 'Maintain Zone Group' pane. It contains several input fields: 'Zone Group ID' (199), 'Zone Group Name' (ZG-0009), 'Type' (Promotion; Regular; C), 'Location' (empty), and 'Currency' (empty). Below these is a table with columns: Zone ID, Zone Name, Currency, Location Count, and Base. The table has two rows: one for Zone ID 533, Zone Name FRANCA, Currency CAD, Location Count 0, and Base 0; and another for Zone ID 381, Zone Name A1, Currency USD, Location Count 2, and Base 2. At the bottom are buttons for 'Save', 'Locations', and 'Delete'.

Zone ID	Zone Name	Currency	Location Count	Base
533	FRANCA	CAD	0	0
381	A1	USD	2	2

Maintain Zone Group pane

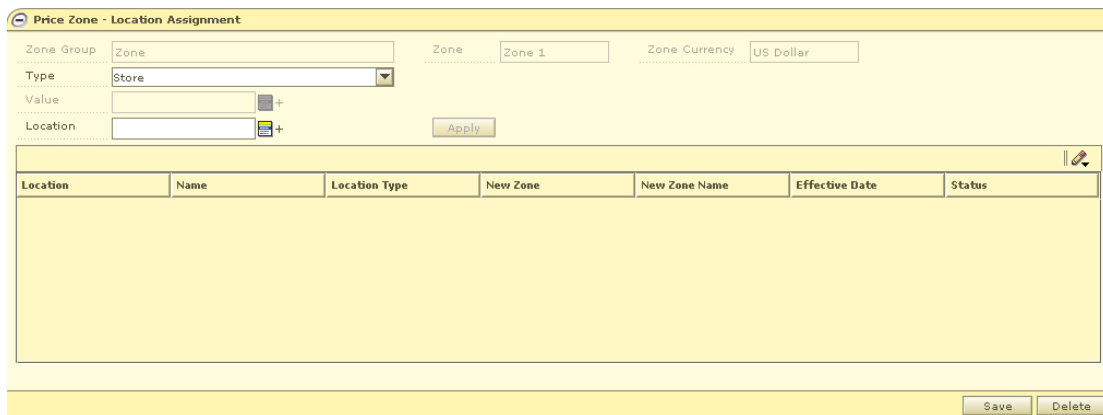
3. Edit the Zone Group Name, Location, and Currency fields as necessary.
4. Add zones to the zone group.
5. To delete a zone:
 - a. Select a zone.
 - b. Click **Delete**. The zone is removed from the list of zones.



Note: You must first delete all locations from the zone before you can delete it.

Edit locations



1. Select a zone.
2. Click **Locations**. The Price Zone – Location Assignment pane is displayed.



The screenshot shows the 'Price Zone - Location Assignment' pane. It contains input fields for 'Zone Group' (Zone), 'Zone' (Zone 1), 'Zone Currency' (US Dollar), 'Type' (Store), 'Value' (empty), and 'Location' (empty). Below these is a table with columns: Location, Name, Location Type, New Zone, New Zone Name, Effective Date, and Status. At the bottom are buttons for 'Save' and 'Delete'.

Location	Name	Location Type	New Zone	New Zone Name	Effective Date	Status
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Price Zone - Locations Assignment pane

3. Add locations to the zone.
4. To move the locations in a zone to a new zone:
 - a. Select a location.
 - b. In the New Zone field, select the ID of the zone you want to move the location to, or click the LOV  button and select a new location.
 - c. In the Effective Date field, enter the date the location moves to the new zone, or click the calendar  button and select a date.
 - d. Click **Apply** to add your changes.
 - e. Click **Save** to commit your changes.
5. To delete a location from a zone.
 - a. Select a location.
 - b. Click **Delete**. The location is removed from the list of locations.

Complete the zone edits

- Click **Done** to save any changes close the workspace.

Add a primary zone group

⇒ **Navigate:** From the Task Pad, select Zone Structure > Maintain Primary Zone Groups. The Maintain Primary Zone Group workspace is displayed.

The screenshot shows the 'Maintain Primary Zone Group' workspace. At the top is a 'Zone Retail Definition List' table with the following data:

Dept.	Dept Description	Class	Class Description	Subclass	Subclass Description	Regular Price Zone	Regular Price Zone	Initial Price Setting	Markup Type
7001	DOC Test Dept. 2	700	DOC Class 1 in ...	71	DOC SC 2 in 700	91	Rick's Teams	33%	Retail Markup
22	DW working dept					12	HL-regular	20%	Retail Markup
1	Corin's Departm...					13	Corin's ZQ	50%	Retail Markup
1221	Kitchenware					12	HL-regular	100%	Retail Markup
7000	DOC Test Dept					402	corin test	50%	Retail Markup
4567	Womens shoes					12	HL-regular	1%	Retail Markup
7001	DOC Test Dept. 2					131	DW USD	25%	Retail Markup

Below the table are buttons for 'Delete', 'Edit', and 'Add'. At the bottom of the workspace are 'Cancel', 'Save + Repeat', and 'Done' buttons. The Retek logo is visible in the bottom left corner.




Maintain Primary Zone Group workspace

1. Click **Add**. The Zone Retail Definition Maintenance pane is displayed.

The screenshot shows the 'Zone Retail Definition Maintenance' pane. It contains the following fields and controls:


- Merchandise Level:**
 - * Department: [Text Field] [LOV Button]
 - Class: [Text Field] [LOV Button]
 - Subclass: [Text Field] [LOV Button]
- Regular Price Zone Group:**
 - * Zone Group: [Text Field] [LOV Button]
- Initial Price Settings:**
 - Markup %: [Text Field]
 - ☒ Retail Markup ☐ Cost Markup
 - Price Guides: [Button]
- Buttons:** [Apply]

Zone Retail Definition Maintenance pane

2. In the Department field, enter the ID of the department, or click the LOV  button and select a department.
3. In the Class field, enter the ID of the class, or click the LOV  button and select a class.
4. In the Subclass field, enter the ID of the subclass, or click the LOV  button and select a subclass.



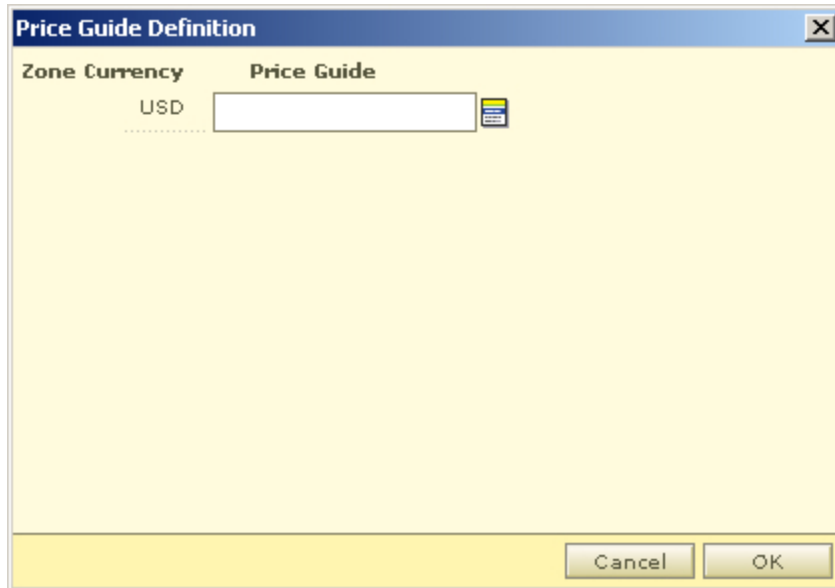
Note: You must select the merchandise hierarchy levels above class and subclass before you can identify class and subclass.

5. In the Zone Group field, enter the ID of the zone group you want to associate with the selected merchandise hierarchy level, or click the LOV  button and select a zone group.




Note: Regular price zone groups are the only type of zone groups that can be attached to a primary zone group.

6. In the Initial Price Settings container:
 - a. In the Markup % field, enter the percent of markup that is applied to the cost of the item.
 - b. Select either Retail Markup or Cost Markup to indicate how the markup is calculated.
7. To add a price guide, click **Price Guides**. The Price Guide Definition window is displayed.



The image shows a software window titled "Price Guide Definition". It has a yellow background and a blue title bar. Inside the window, there are two columns: "Zone Currency" and "Price Guide". Under "Zone Currency", the text "USD" is displayed. To the right of "USD" is a small icon of a document with a magnifying glass. Below "USD" is a dotted line. At the bottom of the window, there are two buttons: "Cancel" and "OK".

Price Guide Definition window

8. For each currency, enter a price guide ID, or click the LOV  button and select a price guide.



Note: Only price guides that are associated with the department selected in the Zone Retail Definition Maintenance container are displayed. For each currency, you can select a price guide, if a price guide has been set up for the currency and department.

8. Click **OK** to save any changes and close the window.
9. Click **Apply** to add your changes to the table.
10. Click **Done** to save any changes and close the workspace.

Maintain a primary zone group

- ⇒ **Navigate:** From the Zone Structure menu, select Maintain Primary Zone Groups. The Maintain Primary Zone Group workspace is displayed.

The screenshot shows the 'Maintain Primary Zone Group' workspace. At the top is a yellow header bar with the title 'Zone Retail Definition List'. Below it is a table with the following data:

Dept.	Dept Description	Class	Class Description	Subclass	Subclass Description	Regular Price Zone	Regular Price Zone	Initial Price Sett	Markup Type
7001	DOC Test Dept. 2	700	DOC Class 1 in ...	71	DOC SC 2 in 700	91	Rick's Teams	33%	Retail Markup
22	DW working dept					12	HL-regular	20%	Retail Markup
1	Corin's Departm...					13	Corin's ZQ	50%	Retail Markup
1221	Kitchenware					12	HL-regular	100%	Retail Markup
7000	DOC Test Dept					402	corin test	50%	Retail Markup
4567	Womens shoes					12	HL-regular	1%	Retail Markup
7001	DOC Test Dept. 2					131	DW USD	25%	Retail Markup

Below the table are buttons for 'Delete', 'Edit', and 'Add'. At the bottom of the window are buttons for 'Cancel', 'Save + Repeat', and 'Done'. The Retek logo is visible in the bottom left corner.

Maintain Primary Zone Group workspace

1. Click **Edit**. The Zone Retail Definition Maintenance pane is displayed.

The screenshot shows the 'Zone Retail Definition Maintenance' pane. It has a yellow header bar with the title 'Zone Retail Definition Maintenance'. The main area is divided into two sections: 'Merchandise Level' and 'Regular Price Zone Group'. Under 'Merchandise Level', there are input fields for 'Department', 'Class', and 'Subclass', each with a dropdown arrow. Under 'Regular Price Zone Group', there is an input field for 'Zone Group' with a dropdown arrow. Below these sections is the 'Initial Price Settings' section, which includes a 'Markup %' input field, radio buttons for 'Retail Markup' (selected) and 'Cost Markup', and a 'Price Guides' button. At the bottom right is an 'Apply' button.

Zone Retail Definition Maintenance pane

2. Edit the enabled fields as necessary.
3. Click **Apply**.
4. Click **Done** to save any changes and close the workspace

Delete a primary zone group

1. Select a primary zone group.
2. Click **Delete**. Your changes are removed from the table..
3. Click **Done** to save any changes and close the workspace.

Appendix A – Glossary

Term	Definition	Calculation/Example	Reference
Buy/Get Component	A component for which the items at specific locations are promoted at a percent off, amount off, or fixed price, based on the purchase of other items.		
Class	The fifth level in the merchandise hierarchy. The class breaks down the merchandise hierarchy. A class can belong to one department.		
Clearance	A clearance is designed to move out of date and slow selling merchandise out of a store. A clearance is considered a permanent price change, and inventory is consequently revalued. Once the reset date for a clearance has passed, the item's price and inventory value is returned to the regular price.		
Component	The details of a promotion, including the merchandise, location and effective dates. A component can be simple, threshold, or buy/get.		Simple Component, Threshold Component, Buy/Get Component
Currency	Coins, treasury notes, and banknotes in circulation, used as the medium of exchange.		
Deal	The agreement between a retailer and a vendor for rebates or discounts applied to an item when ordered from the supplier or sold to the customer in certain quantities.		
Department	Belongs to a group in the merchandise hierarchy and provides a way to define the areas of a group. A department is the fourth division in the merchandise hierarchy.		
Diff	A characteristic of an item that distinguishes it from another item. An item may have up to four diffs.	Color, size, flavor, scent	
Diff Type	The category that a diff belongs.	Size, Color, Flavor, Scent	Diff Group, Diff Range
Effective Date	The date on which an event becomes available or active in the system.		

Term	Definition	Calculation/Example	Reference
End Date	The last day an element is effective in the system.		
Event	The top level of a promotion, used to group several promotions together.		
Item	The merchandise received from a supplier. In the system, the item field or column will display the item number, the item description, or both.		
Item Level	The level of an item in an item group.		
Location	The store or warehouse involved in an event. In the system, the location field or column will display the location number, the location description, or both.		
Markup	An amount added to the cost price to determine the selling price.		
Out of Stock Date	The date when the inventory is expected to be exhausted.		
Partner	A person or entity that has an association with your organization in various areas of the procurement process. Partners can include those involved in transporting goods, escheatment, providing credit, and providing services. A partner does not provide items to a retailer.		
Price Guide	A price guide allows you to create a uniform price strategy. You can use them to maintain a consistent price points. You can determine if the prices in a guide should be rounded in the same manner or if they should all end in the same digits.		

Term	Definition	Calculation/Example	Reference
Primary Zone Group	The primary zone group is used to determine how to items are initially priced in the merchandising system. When you create a primary zone group, you identify the merchandise hierarchy level, the zone group, the markup percent, the markup type, and the price guide. The merchandise hierarchy assigned to a new item in merchandising system will determine the primary zone group definition in RPM used to initially price the item. Based on the information associated with the primary zone group and the cost of the item, as entered in merchandising system, prices will be proposed.		
Promotion	A promotion is a temporary reduction in price. In addition, you can track sales at one or more locations for a given time period as well as track the sales of merchandise with no price reductions, at given locations for a set time period.		
Reason code	The resolution or reason that is applied to an event that occurs within a system.		
Simple Component	A component for which the items at specific locations are promoted at a percent off, amount off, or fixed price.		
Start Date	The first day an element is effective in the system.		
Threshold Component	A component for which the items at specific locations are promoted by achieving a specific purchasing level.		
Zone	A zone is a group of locations that are priced the same within a zone group. Locations within a zone must have the same currency. Not all locations must be assigned to a zone.		
Zone Group	Zone groups are a collection of zones. You can define multiple zone groups that are suited to your business. After you define the zone group, you can define the zones in the zone group. Multiple currencies may exist within a zone group.		