

Retek[®] Price Management[™] 11.0.2

User Guide

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Internet (ROCS)	rocs.retek.com Retek's secure client Web site to update and view issues
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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	Define price guides
Define system defaults	Define candidate rules
Maintain codes	Set up pricing attributes
Define aggregation levels	Set up zone structures
Maintain location move	Create calendar
	Maintain calendar
Price strategies	
Define area differentials	
Create a clearance pricing strategy	
Create a competitive pricing strategy	
Create a margin pricing strategy	
Maintain price strategies	
Worksheets	
Worksheet Status	
Worksheet detail	

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
Create a threshold definition	Create vendor funding defaults
	Add funding information to a promotion
Create a simple component	
Create a threshold component	
Create a buy/get component	

Chapter 2 – Navigating RPM

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

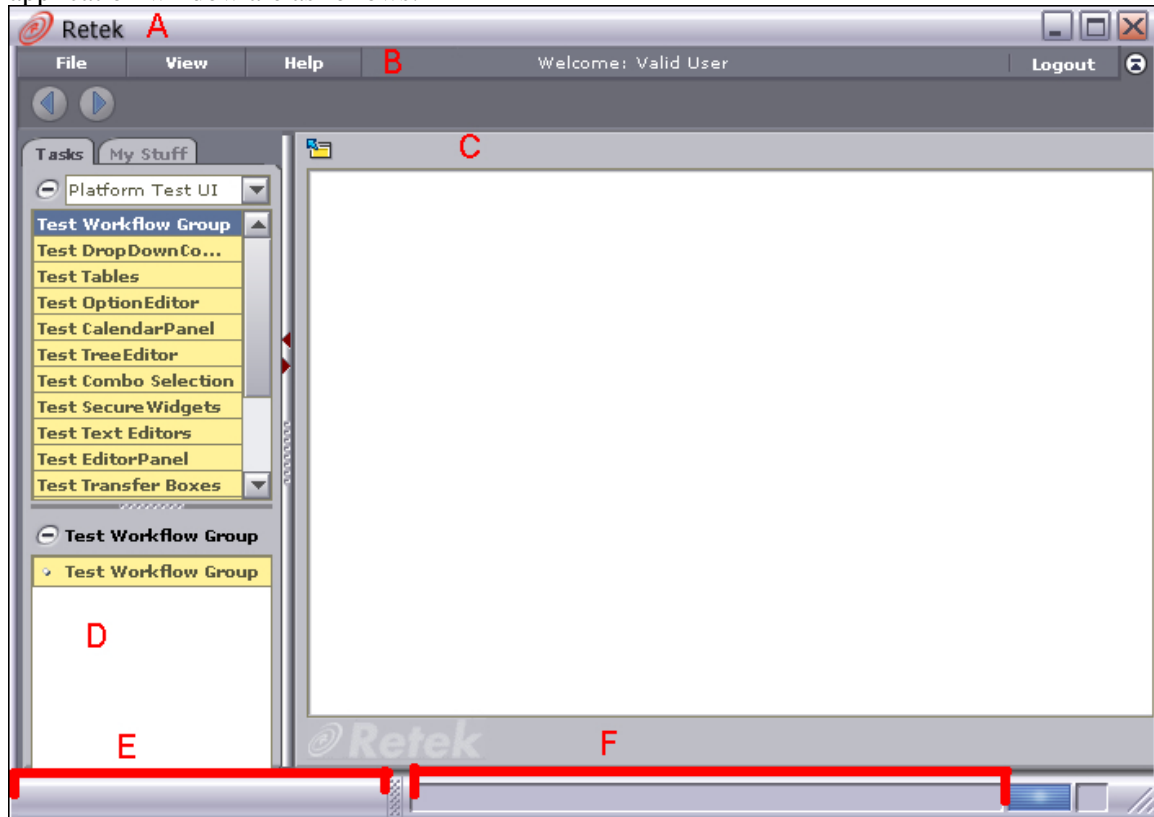
There are a few ways you can log out of and close RPM. You can:

- 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	Toolbar	Located below the header. The toolbar contains paging control icons and fields that allow you to perform a global search for data.

Element		Purpose
D	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.
E	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.
F	Task bar	Located at the bottom of the window. Task buttons, located on the task bar allow you to switch between open tasks.
G	Status bar	Located at the bottom of the window. The status bar lists the status of a task and gives other information.
H	Pane	A sub-section of a window that appears in the work space. Multiple panes may appear in the workspace when a task is selected.
	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.

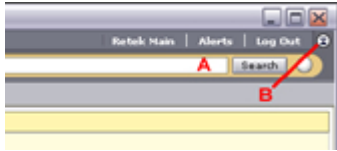
- To manually resize the window, place the cursor over the edge of the window. When the cursor changes to a double arrow, press and hold the left mouse button. Move the cursor until the window is the desired size. Release the left mouse button.



- 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.

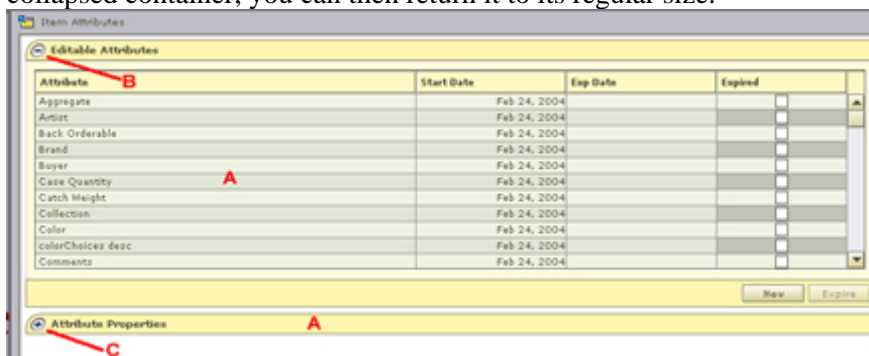
- To maximize the task pad, click the right arrow on the separator bar (A). To minimize the task pad, click the left arrow. Note that the width of the task pad can be one of three sizes:



- 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).

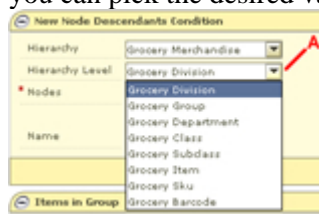
Looking up field level data

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

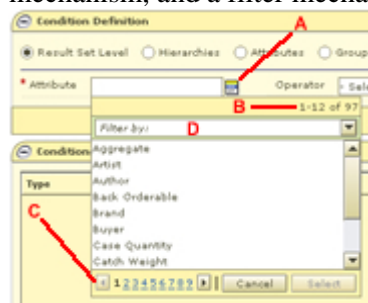
Some fields are restricted to a predefined list of values. You access a drop-down list from which you can pick the desired value.




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.

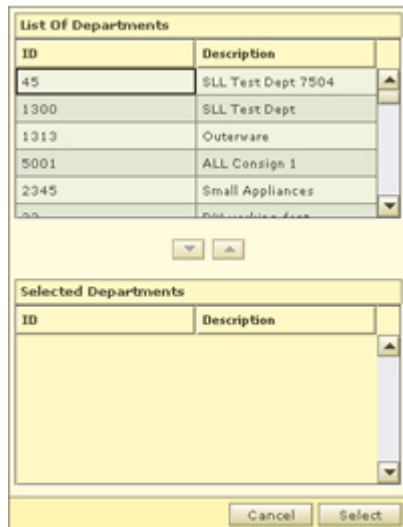


1. Click the LOV  button next to a text field (A). The list of values popup opens. The number of values displayed on the first page and the total number of values appears on the title bar (B) of the popup.
2. To find a value, use one or a combination of the following methods:
 - Page through the values 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 similar to the select functionality of other Windows applications.



ID	Description
45	SLL Test Dept 7504
1300	SLL Test Dept
1313	Outerware
5001	ALL Consign 1
2345	Small Appliances

ID	Description
----	-------------

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

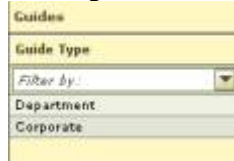
You search for records when none are displayed. By entering search criteria, you indicate which records must be displayed for your use. Filtering, on the other hand, allows you to reduce the number of records (or values) displayed. Again, you enter criteria indicating which of the currently displayed 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

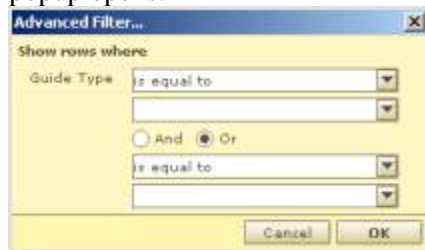
Column-level filtering is available in tables that have drop-down lists.

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.

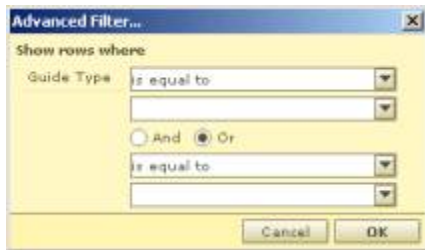


- b. Select a relational operator in the first list box. Then select a value in the second list box.
 - c. If another condition is necessary, select a logical operator (And or Or). Then select the second relational operator and value.
 - d. Click **OK**. The records that match the conditions are displayed 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 – 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 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 the worksheet status is displayed at.
 - **Historical Sales:** Select the sales period RPM should look at when calculating price changes.
 - **Regular:** Select the check box to indicate that regular sales should be included as part of historical sales in the price worksheet.
 - **Clearance:** Select the check box to indicate that clearance sales should be included as part of historical sales in on the price worksheet.
 - **Promotion:** Select the check box to indicate that promotional sales should be included as part of historical sales in on the price worksheet.
 - **Include WH Inventory:** Select the check box to indicate that warehouse inventory should be included in the calculations for sell through and price change impact in the price worksheet.
 - **Include On Order In Sell Thru:** Select the check box to indicate that inventory ordered is included in the sell through calculations 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 features a 'Defaults' section with several configuration fields:

- Lead Item Calculation Type:** Margin (dropdown)
- Pricing Strategy:** Clearance (dropdown)
- Protect Setting:** ☒
- Currency:** USD (text field) with a flag icon and 'US Dollar' label.
- Price Change Item Level:** Transaction Level Item (dropdown)
- Price Change Diff Type:** Size (dropdown)
- Price Change Type:** Change By Amount (dropdown)

The workspace includes a 'Cancel' button and a 'Save' button at the bottom right. The Retek logo is visible in the bottom left 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 Retek logo and a 'Close' button. The main area is divided into two columns of settings. The left column includes: 'Lead Item Calculation Type' (Margin), 'Pricing Strategy' (Clearance), 'Protect Setting' (checked), and 'Currency' (USD with a US Dollar icon). The right column includes: 'Price Change Item Level' (Transaction Level Item), 'Price Change Diff Type' (Size), and 'Price Change Type' (Change By Amount). Each setting is followed by a dropdown menu or a checkbox.

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

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 list of options organized into two columns. Each option is preceded by a red asterisk. The options include calculation methods, update attributes, cost calculations, warehouse recognition, zone use, purge reset, rejects held, promotion history, event ID, zone/parent ranging, location move lead time, multiple item/loc promotions, price change/promotion overlaps, clearance/promotion overlaps, allow complex promotions, exact deal/funded promotion dates, default out of stock days, default reset date, price change processing days, ends in digits for zero decimal currencies, external prices allowed, and apply promo change type 1st. The 'Retek' logo is visible in the bottom left corner, and 'Cancel' and 'Save' buttons are in the bottom right corner.

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 Dedimal Currencies	0
External Prices Allowed	<input checked="" type="checkbox"/>
Apply Promo Change Type 1st	Amount Off

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

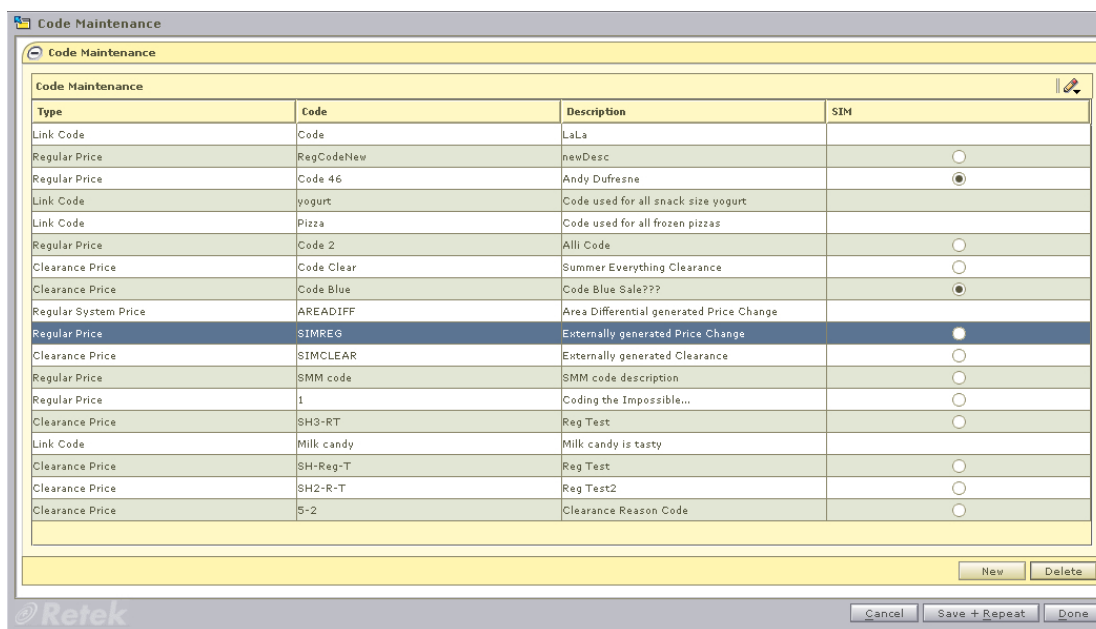
Overview

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 lists various codes such as 'Link Code', 'Regular Price', 'Clearance Price', and 'Regular System Price'. The 'SIM' column contains radio buttons, some of which are selected. At the bottom of the workspace, there are buttons for 'New', 'Delete', 'Cancel', 'Save + Repeat', and 'Done'.

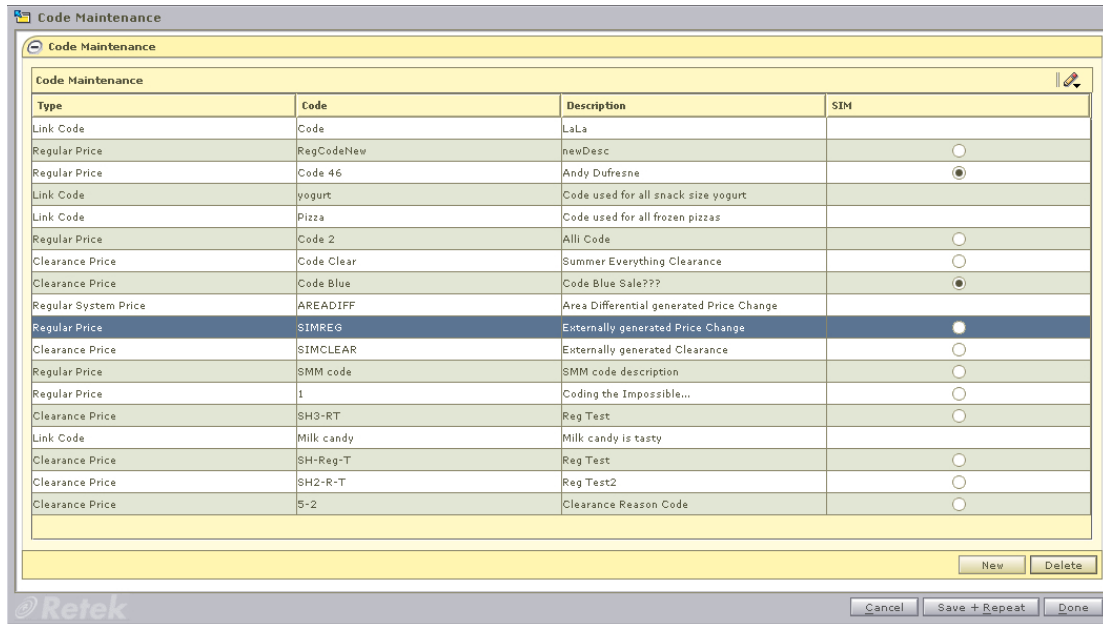
Type	Code	Description	SIM
Link Code	Code	LaLa	
Regular Price	RegCodeNew	newDesc	<input type="radio"/>
Regular Price	Code 46	Andy Dufresne	<input checked="" type="radio"/>
Link Code	yogurt	Code used for all snack size yogurt	
Link Code	Pizza	Code used for all frozen pizzas	
Regular Price	Code 2	Alli Code	<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.

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



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

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

Chapter 4 – 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.

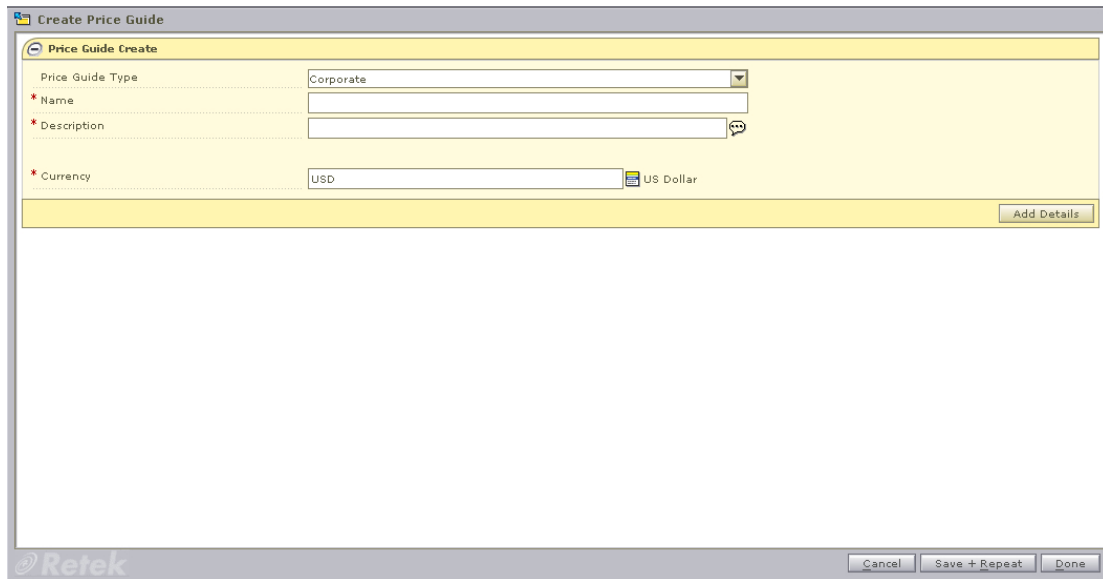
Price guides can be set up at the corporate level or at the department level. A corporate level price guide is created and maintained at the corporate level, but can be referenced by many departments. If any changes are made to a corporate price guide all departments that are linked to the corporate 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). After price guides are defined, they can be used when setting up pricing strategies, price changes, clearances, and promotions.


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.

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 block of intervals.
2. In the End Price field, enter the high price of the block of intervals.
3. In the Increment field, enter the amount each interval 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 is updated with the Ends In Digits specified by the user.

Complete the price guide

- Click **Done** to save any changes and 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 is a 'Pricing Guides List' section with a 'Filter by:' dropdown. Below this is a table with columns: Guide Type, Name, Description, Dept., Currency, and Linked. The table contains several rows of data, including 'Corin's Rockin PG', 'Huh?', 'PG for PC & Clear Testing', 'PG Diff cur (AUD)', 'Jodi's 2nd copy', and 'Jodi's 2nd copy' (linked to '1221 - Kitchenware'). At the bottom of the table are 'Delete' and 'Edit' buttons. The Retek logo is visible in the bottom left corner, and 'Cancel', 'Save + Repeat', and 'Done' buttons are in the bottom right corner.

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:

From: To: New Retail:

New Retail Ends In:

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.

Copy Price Guide

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
Filter by: [dropdown]					
Corporate	Jodi's 2nd copy	Jodi's 2nd copy		USD	<input checked="" type="checkbox"/>
Corporate	HL-corporate	HL-corporate		USD	<input checked="" type="checkbox"/>
Corporate	foo	foo		USD	<input type="checkbox"/>
Corporate	SLH guide	test guide		USD	<input type="checkbox"/>
Corporate	DW Corp Guide	Prices so low we call it crazy ...		USD	<input type="checkbox"/>
Corporate	corin's corporate	hi		USD	<input checked="" type="checkbox"/>

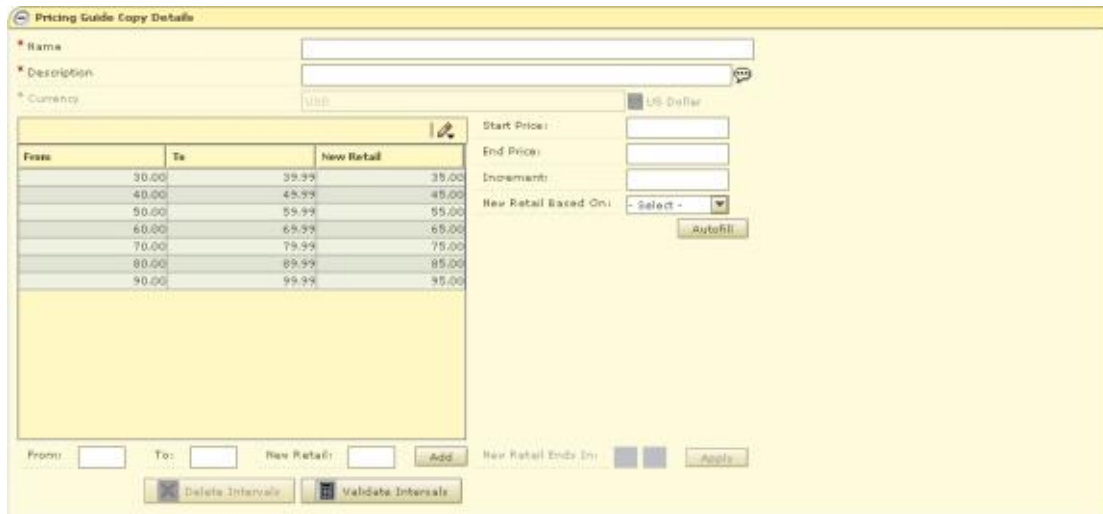
Copy

Retek

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



Pricing Guide Copy Details

Name:

Description:

Currency:

From	To	New Retail
30.00	39.99	39.00
40.00	49.99	48.00
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

Start Price:

End Price:

Increment:

New Retail Based On:

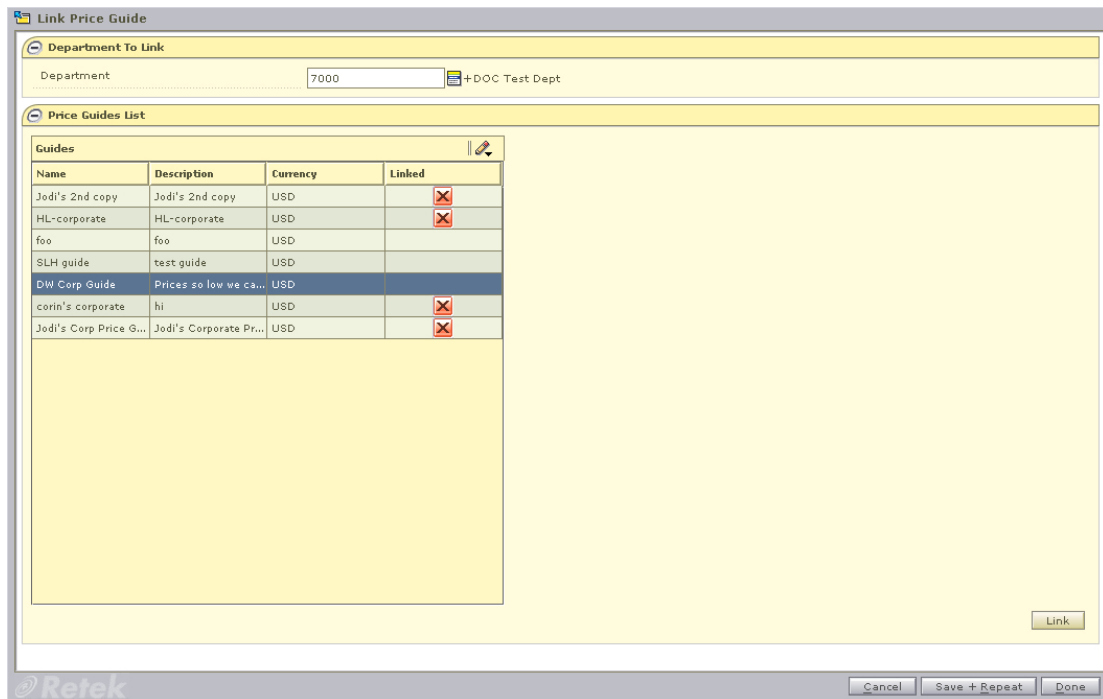
From: To: New Retail: New Retail Ends On:

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:

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 Price Guide workspace

Retek Price Management

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.

Update candidate rules and rule variables

Overview

The pricing office of your organization determines the optimum strategies for using RPM in your business. After these strategies are decided, you can define the candidate rules and set up the following parameters:

- Candidate rules
- Variables for candidate rules

You use candidate rules to search the database for items that need to be identified for pricing review. Candidate rules are defined at the corporate level. You can modify any of the candidate rule parameters. Some rules have variable values. These values are assigned and can be modified at the department level.



Note: Rules that have variables defined are run only against items in Departments where a value has been assigned to the variable. If there is no variable value for a Department, the candidate rule will not run against items from that Department.

There are two types of candidate rules: Inclusion and Exclusion. Exclusion rules are always run first. Inclusion rules can contain a variable for Department level differences in the value to be searched against.

Procedures

Set up a candidate rule and define a variable for the rule

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


Create candidate rule workspace

1. In the Name field, enter the name of the candidate rule.
2. In the Description field, enter a description of the candidate rule. This description can be up to 250 characters.
3. In the Type, select the kind of candidate rule that you are creating.
4. In the Status field, select the active status of the rule. Only active rules are run during a review period.
5. In the Field column, select the field to which the candidate rule is applied.
6. In the Operator field, select the relationship that the Field item has to the Value or Variable Name.



Note: All options may not be available for some field types.


Operator	Relationship
=	Equal to
<	Less Than
>	Greater Than
<=	Less than or equal to
>=	Greater than or equal to
	Not equal to

7. In the Value field, enter the ID of value or click the LOV  button and select a value.



Note: If you enter a Value, the rule runs against all Departments that use this value in the rule. If you enter a Variable, you can assign the value of the Variable by Department.

Assign a variable value

1. Select the Variable check box.
2. If the Variable is a new variable, select the New check box.
3. In the Value field, enter the name if it is a new variable or click the LOV  button and select an existing variable.

Complete the candidate rule

1. Enter additional conditions as necessary.
2. Click **Add**. The condition is displayed in the conditions area.



Note: A single rule can have multiple conditions. If multiple conditions exist for a rule, an item must meet all of the conditions in order for the rule to be met.

3. Click **Done** to save any changes and close the window.

Maintain rule variables by variable or by department

⇒ **Navigate:** From the Task Pad, select Candidate Rules > Maintain Rule Variables. The Rule Variable Maintenance workspace is displayed.

Rule Variable Maintenance

Method: By Variable

Variable:

Rule Variable Maintenance By Variable

Department	Description	Variable Value
------------	-------------	----------------

Remove Value

Cancel Save + Repeat Done

Rule variable maintenance workspace

1. In the Method field, select how you want to update the rule variables
2. In the Variable/Department field, select the value you want to use to update the rule variable.
3. In the Variable Value field, enter the value to be associated with the variable when the rule is run against items in the department.
4. To update the values for multiple departments:
 - a. Multi-select the departments you want to update
 - b. In the Value field below the Rule Variable Maintenance By Variable table, enter the value to be associated with the variable when the rule is run against items in the department.
 - c. Click **Apply**.
5. Click **Done** to save any changes and close the workspace.

Maintain a candidate rule

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

The screenshot shows the 'Maintain Candidate Rules' workspace. It features a table titled 'Candidate Rule List' with the following columns: Name, Text, Variable, Type, and Status. The table contains seven rows of candidate rules. Below the table are 'Delete' and 'Edit' buttons. At the bottom of the workspace are 'Cancel', 'Save + Repeat', and 'Done' buttons. The Retek logo is visible in the bottom left corner.

Name	Text	Variable	Type	Status
SLL Second Retest test	Projected Sales < [FU...	<input checked="" type="checkbox"/>	Inclusion	Active
SLL Retest 4198 Candida...	Sell Through = 0.2; C...		Inclusion	Active
Test Candidate Rules	Department = 1818 Clas...		Inclusion	Active
Dept 2	Department = 2		Inclusion	Active
Test 2	Season Code = Sprin...		Inclusion	Active
Test 3	Market Basket Code = 00...		Inclusion	Active
Dept 1704	Department = 1704		Inclusion	Active

Maintain candidate rules workspace

1. Select the candidate rule you want to change.
2. Click **Edit**. The Candidate Rule Maintenance workspace opens with information about the selected candidate rule.
3. Change information in any of the fields, as necessary.



Note: See the Set up a candidate rule and define a variable for the rule procedure for additional information.

4. If you want to use the value as a variable:
 - a. Check the box in front of Use value as variable.
 - b. Enter or Click (LOV) to display a list of existing values.
 - c. Select an appropriate value from the list.
5. If you want to edit only the Condition portion of a rule:



Note: To add a new Condition to a rule without changing any existing Conditions, follow steps c-d below.

- a. In the Conditions box, select the Condition that you want to change.

- b. Click **Edit**. The components of the selected condition display in the Field, Operator, and Values or Variable Name fields.
- c. Enter the appropriate information in the Field, Operator, and Values or Variable Name fields.
- d. To include the new or updated Condition without removing the existing Condition, click **Add**.

Or

- To substitute the existing Condition with the one you just created or edited, click **Replace**.
6. To return to the Candidate Rules window, click **Cancel**. All information that you did not save in the Candidate Rule Maintenance window is lost.
 7. To delete a condition, select the condition in the Conditions box.
 8. Click **Delete**. The condition is removed.
 9. To apply all of the changes that you made in this window, click **Save**. You are returned to the Candidate Rules window.

Delete a candidate rule

⇒ **Navigate:** From the Task Pad, select Candidate Rules > Maintain Candidate Rules. The Maintain Candidate Rules workspace is displayed with all of the current candidate rules listed.

Name	Text	Variable	Type	Status
SLL Second Retest test	Projected Sales < [FU...	<input checked="" type="checkbox"/>	Inclusion	Active
SLL Retest 4198 Candida...	Sell Through = 0.2;C...		Inclusion	Active
Test Candidate Rules	Department = 1818 Clas...		Inclusion	Active
Dept 2	Department = 2		Inclusion	Active
Test 2	Season Code = Sprin...		Inclusion	Active
Test 3	Market Basket Code = 00...		Inclusion	Active
Dept 1704	Department = 1704		Inclusion	Active

Maintain candidate rules workspace

1. Select the candidate rule you want to delete.
2. Click **Delete**. A message displays, “Are you sure you want to delete the selected rule?”
3. Click **OK** to delete the rule. The rule is removed from the list.



Note: Variables are not deleted if you delete a rule that has a condition with variables and values are assigned at the Department level. This feature allows you to use the existing variables and assigned values when you create a new rule. To delete the variables, see the Delete a candidate rule variable procedure.

Delete a candidate rule variable

- ⇒ **Navigate:** From the Task Pad, select Candidate Rules > Maintain Rule Variables. The Rule Variable Maintenance workspace is displayed.

Department	Description	Variable Value
------------	-------------	----------------

Rule variable maintenance workspace



Note: If the variable is attached to a candidate rule, you must delete the candidate rule before you can delete the variable. To delete the candidate rule, see the Delete a candidate rule procedure.

1. In the Department field, enter the Department number or click (LOV) and select from the list of values.
2. Click **View**. A list of the defined variables with their assigned values displays.
3. Select the radio button for the candidate rule variable that you want to remove.
4. Click **Delete**. A message displays, “This variable will be deleted for all Departments. Do you want to continue?”

- Click **OK**. The variable is removed from the list.



Note: To leave the window without making changes, click Cancel.

Update a candidate rule variable



Note: Rules that have variables defined are run only against items in Departments where a value has been assigned to the variable. If there is no variable value for a Department, the candidate rule will not run against items from that Department.

- ⇒ **Navigate:** From the Task Pad, select Candidate Rules > Maintain Rule Variables. The Rule Variable Maintenance workspace is displayed.

Department	Description	Variable Value
------------	-------------	----------------

Rule variable maintenance workspace

- In the Department field, enter the Department number or click (LOV) and select from the list of values.
- Click **View**. A list of the defined variables with their assigned values displays.



Note: To apply the same variable to more than one Department, select the desired Departments from the list. For more information on selecting multiple items from a list, see the Select multiple options from a list procedure.

- In the Value field for the candidate rule variable that you want to edit, enter the appropriate value.
- Click **Save**. The information is saved.



Note: To leave the window without making changes, click Cancel.

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.

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, and Diff. On the right side of the search pane are Zone Group, Zone, Location, Market Basket Code, and Link Code. Each field has a small icon to its right. At the bottom right of the search pane are 'Search' and 'Reset' buttons. The main workspace area below the search pane is empty. At the bottom of the workspace are 'Cancel', 'Save + Repeat', and 'Done' buttons. The Retek logo is visible in the bottom left corner.

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.

The screenshot shows the 'Maintain Pricing Attributes' workspace with the results table displayed. 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 respective 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

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 '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 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', 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 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. Below the search section is a Retek logo and a row of buttons: 'Cancel', 'Save + Repeat', and 'Done'.

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 a text 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 that are priced the same. 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 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.

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 contains the following elements:

- Form Fields:**
 - Zone Group ID: 451
 - Zone Group Name: Zone
 - Type: Regular
 - Like Group: ☐
 - Zone ID: 659
 - Zone Name: (empty)
 - Currency: (empty)
- Buttons:** Next, Apply, Save, Locations, Delete, Cancel, Save + Repeat, Done.
- Table:**

Zone ID	Name	Currency	Location Count	Base

Create Zone Group workspace

1. In the Zone Group ID field, edit the generated 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 generated 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.

Price Zone - Location Assignment

Zone Group: Zone Zone: Zone 1 Zone Currency: US Dollar

Type: Store

Value: +


Location: +

Apply

Location	Name	Location Type	New Zone	New Zone Name	Effective Date	Status
----------	------	---------------	----------	---------------	----------------	--------

Save Delete

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 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 showing 'Regular'.
- Like Group:** A checkbox that is currently unchecked.
- Next:** A button to the right of the 'Like Group' checkbox.
- Zone ID:** A text field containing '659'.
- Zone Name:** An empty text field.
- Currency:** A text field with a currency selection icon.
- Apply:** A button next to the 'Currency' field.
- Table:** A table with the following columns: 'Zone ID', 'Name', 'Currency', 'Location Count', and 'Base'. The table body is empty.
- Buttons:** 'Save', 'Locations', and 'Delete' buttons are located below the table. At the bottom of the workspace are 'Cancel', 'Save + Repeat', and 'Done' buttons.

Create Zone Group workspace

1. In the Zone Group ID field, edit the generated 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.

The screenshot shows the 'Maintain Zone Group' workspace. At the top, there's a 'Price Zone Group List' section with filters for Location, Currency, and Type. Below this is a table with the following data:

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

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

Maintain Zone Group workspace

- Filter for the records as necessary:
 - In the Location, Currency, and Type fields, enter the criteria you want to filter for.
 - 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.

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

Edit zones

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

The screenshot shows the 'Maintain Zone Group' pane. It displays details for a selected zone group (ID 199, Name ZG-0009, Type Promotion; Regular; C). Below this, there's a table with the following data:

Zone ID	Name	Currency	Location Count	Base
533	FRANCA6	CAD	0	<input type="radio"/>
381	A1	USD	2	<input checked="" type="radio"/>

At the bottom of the pane, there are buttons for 'Save', 'Locations', and 'Delete'.

Maintain Zone Group pane

3. Edit the Zone Group Name, Location, and Currency fields as necessary.



Note: If there are no locations in the zone the currency field is editable. If locations exist in the zone then the currency field is NOT editable.

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.

Price Zone - Locations Assignment pane

3. Add locations to the zone.



Note: When you add a location to a zone that was previously saved, a location move is scheduled. Go to the Maintain Location Move workspace to view the location move.

4. To delete a location from a zone.
 - a. Select a location.
 - b. Click **Delete**. The location is removed from the list of locations.



Note: When you delete a location from a zone a location move is scheduled. Go to the Maintain Location Move workspace to view the location move.

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, there's 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 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 ZG	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.

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 has two main sections: 'Merchandise Level' and 'Regular Price Zone Group'.

Merchandise Level: Includes fields for 'Department', 'Class', and 'Subclass', each with a dropdown arrow button.

Regular Price Zone Group: Includes a 'Zone Group' field with a dropdown arrow button.

Initial Price Settings: Includes a 'Markup %' field and two radio buttons: 'Retail Markup' (selected) and 'Cost Markup'. There is also a 'Price Guides' button.

An 'Apply' button is located at the bottom right of the pane.

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. Class and subclass are not required. You can define a primary zone group at the Department level.

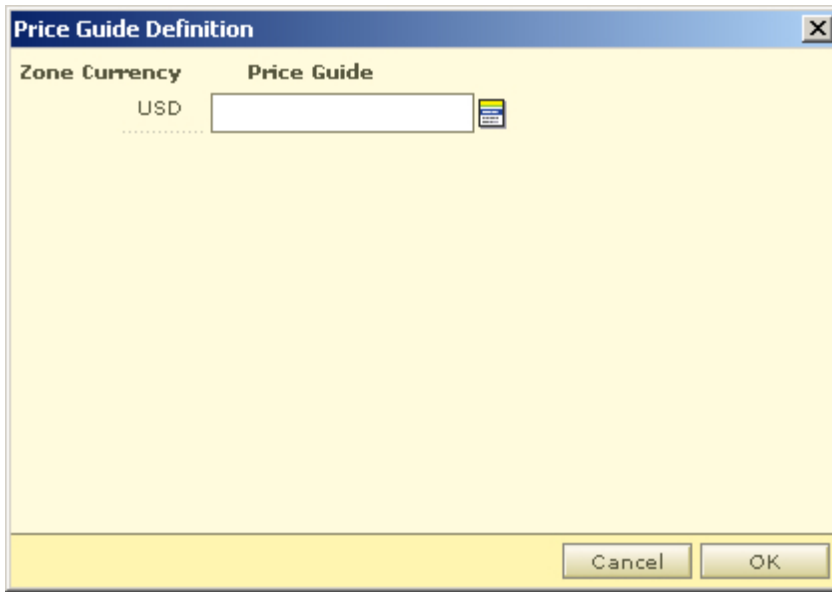
5. In the Zone Group field, enter the ID of the zone group you want to associate with the selected merchandise hierarchy level, or click the LOV button and select a zone group.



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 above a dotted line. To the right of this, there is a text input field for the "Price Guide" and a small icon with a list of items. At the bottom right 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.

9. Click **OK** to save any changes and close the window.
10. Click **Apply** to add your changes to the table.
11. 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 this is a table with the following columns: Dept., Dept Description, Class, Class Description, Subclass, Subclass Description, Regular Price Zone, Regular Price Zone, Initial Price Setting, and Markup Type. The table contains several rows of data, including '7001', '22', '1', '1221', '7000', '4567', and '7001'. 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.

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

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'. Below this are two sections: 'Merchandise Level' and 'Regular Price Zone Group'. The 'Merchandise Level' section has fields for 'Department', 'Class', and 'Subclass', each with a dropdown arrow. The 'Regular Price Zone Group' section has a field for 'Zone Group' with a dropdown arrow. Below these sections is the 'Initial Price Settings' section, which has a 'Markup %' field and two radio buttons: 'Retail Markup' (selected) and 'Cost Markup'. There is also 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.

Maintain location move

Overview

Location Moves allows you to smoothly move a location from one zone to another within a zone group. The process allows a location to keep most location level pricing events while it transfers from the old zones pricing strategies to those of the new zone. Keep the following in mind when scheduling location moves:

- A location does not automatically inherit the price of the new zone. Pricing events scheduled after the move date in the new zone, will be applied to the new location.
- Only location level promotions will follow a location into a new zone. Promotions from the old or new zone that span the move date must be stopped before scheduling a location move.

Procedures

Request a location move

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

Maintain Location Move

Location Move List

ID	Location	Location Name	Location Type	Zone Group	Old Zone	Old Zone Name	New Zone	New Zone Name	Scheduled Date	Status	Conflict	Move Results
451	10000000...	Denver	Store				762	DW 762	11-23-2004	Completed		
452	10000000...	Las Vegas	Store				762	DW 762	11-23-2004	Completed		
461	10000000...	Minneapolis	Store	578	800	MF1			11-24-2004	Failed	✖	
462	10000000...	Fargo	Store	578	800	MF1			11-24-2004	Failed	✖	
465	10000000...	Baltimore	Store	572	794	BB3			11-24-2004	Completed		
466	10000000...	Buffalo	Store	572	794	BB3			11-24-2004	Completed		
415	10000000...	Savannah	Store	180	346	001	706	002	11-17-2004	Completed		

Status: Action:

Maintain Location Move

Zone Group:

Zone:

Location:

New Zone:

Effective Date:

Retek

Maintain location move workspace

1. Click **New**. The Zone Group Field is enabled on the Maintain Location Move pane.

Maintain Location Move

Zone Group:

Zone:


Location:

New Zone:

Effective Date:

Maintain location move pane

2. In the Zone Group field, enter the zone group of the location you need to move, or click the LOV button and select a zone group.
3. In the Zone field, enter zone of the location you need to move, or click the LOV button and select a zone.
4. In the Location field, enter the location you need to move, or click the LOV button and select a Location.
5. In the New Zone field, enter the zone to move the location to, or click the LOV button and select the new zone.

- In the Effective Date field, enter the date the location should move zones, or click the calendar  button and select a date.






Note: The Effective Date you can set depends on the number of days set in the system option Location Move Lead Time. The earliest date a location move can be created is today's date plus the location move lead time.

- Click **Apply**. The location move request appears with a status of Worksheet on the Location Move list.

Schedule a location move

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

ID	Location	Location Name	Location Type	Zone Group	Old Zone	Old Zone Name	New Zone	New Zone Name	Scheduled Date	Status	Conflict	Move Results
451	10000000...	Denver	Store				762	DW 762	11-23-2004	Completed		
452	10000000...	Las Vegas	Store				762	DW 762	11-23-2004	Completed		
461	10000000...	Minneapolis	Store	578	800	MF1			11-24-2004	Failed		
462	10000000...	Fargo	Store	578	800	MF1			11-24-2004	Failed		
465	10000000...	Baltimore	Store	572	794	BB3			11-24-2004	Completed		
466	10000000...	Buffalo	Store	572	794	BB3			11-24-2004	Completed		
415	10000000...	Savannah	Store	180	346	001	706	002	11-17-2004	Completed		

Maintain location move workspace

- Select a location move with a status of Worksheet.
- Select Schedule from the Action drop-down.
- Click **Update**. If no conflicts are found, the location move request is changed to a status of Scheduled and it becomes locked and uneditable. The location will be moved on the effective date.

Reset a failed location move

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

The screenshot shows the 'Maintain Location Move' workspace. It features a 'Location Move List' table with columns: ID, Location, Location Name, Location Type, Zone Group, Old Zone, Old Zone Name, New Zone, New Zone Name, Scheduled Date, Status, Conflict, and Move Results. Below the table is an 'Action' dropdown menu with 'Update' selected. To the right are 'New' and 'Delete' buttons. Below the table is a form for editing a move with fields for Zone Group, Zone, New Zone, and Effective Date, and an 'Apply' button. At the bottom are 'Cancel', 'Save + Repeat', and 'Done' buttons.

ID	Location	Location Name	Location Type	Zone Group	Old Zone	Old Zone Name	New Zone	New Zone Name	Scheduled Date	Status	Conflict	Move Results
451	10000000...	Denver	Store				762	DW 762	11-23-2004	Completed		
452	10000000...	Las Vegas	Store				762	DW 762	11-23-2004	Completed		
461	10000000...	Minneapolis	Store	578	800	MF1			11-24-2004	Failed	⚠	
462	10000000...	Fargo	Store	578	800	MF1			11-24-2004	Failed	⚠	
465	10000000...	Baltimore	Store	572	794	BB3			11-24-2004	Completed		
466	10000000...	Buffalo	Store	572	794	BB3			11-24-2004	Completed		
415	10000000...	Savannah	Store	180	346	001	706	002	11-17-2004	Completed		

Maintain location move workspace

1. Select a location move with a status of Failed.
2. Select Worksheet from the Action drop-down.
3. Click **Update**. The failed location move is changed back to a location move request.
4. Fix the conflict that caused the location move to fail and reschedule it.

View conflicts

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

The screenshot shows the 'Maintain Location Move' workspace. It features a 'Location Move List' table with columns for ID, Location, Location Name, Location Type, Zone Group, Old Zone, Old Zone Name, New Zone, New Zone Name, Scheduled Date, Status, Conflict, and Move Results. Below the table are fields for Status, Action (a dropdown menu), and an Update button. At the bottom right of the table area are New and Delete buttons. Below the table is a form for adding new moves with fields for Zone Group, Zone, Location, New Zone, and Effective Date, followed by an Apply button. The Retek logo is visible in the bottom left corner, and Cancel, Save + Repeat, and Done buttons are in the bottom right corner.

ID	Location	Location Name	Location Type	Zone Group	Old Zone	Old Zone Name	New Zone	New Zone Name	Scheduled Date	Status	Conflict	Move Results
451	10000000...	Denver	Store				762	DW 762	11-23-2004	Completed		
452	10000000...	Las Vegas	Store				762	DW 762	11-23-2004	Completed		
461	10000000...	Minneapolis	Store	578	800	MF1			11-24-2004	Failed		
462	10000000...	Fargo	Store	578	800	MF1			11-24-2004	Failed		
465	10000000...	Baltimore	Store	572	794	BB3			11-24-2004	Completed		
466	10000000...	Buffalo	Store	572	794	BB3			11-24-2004	Completed		
415	10000000...	Savannah	Store	180	346	001	706	002	11-17-2004	Completed		

Maintain location move workspace

- In the Conflict column, click the button. The conflict window opens with the conflict information displayed.

There are three types of conflicts:

- **Promotion** - A promotion from the old or new zone spans the effective date of the move.
- **Schedule** - There is a location move already scheduled for the location.
- **Price Strategy** - The location or old zone is attached to a price strategy.

View move results

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

The screenshot displays the 'Maintain Location Move' workspace. It features a 'Location Move List' table with columns for ID, Location, Location Name, Location Type, Zone Group, Old Zone, Old Zone Name, New Zone, New Zone Name, Scheduled Date, Status, Conflict, and Move Results. Below the table is a form with fields for Zone Group, Zone, Location, New Zone, and Effective Date, along with an 'Apply' button. At the bottom, there are 'Cancel', 'Save + Repeat', and 'Done' buttons.

ID	Location	Location Name	Location Type	Zone Group	Old Zone	Old Zone Name	New Zone	New Zone Name	Scheduled Date	Status	Conflict	Move Results
451	10000000...	Denver	Store				762	DW 762	11-23-2004	Completed		
452	10000000...	Las Vegas	Store				762	DW 762	11-23-2004	Completed		
461	10000000...	Minneapolis	Store	578	800	MF1			11-24-2004	Failed		
462	10000000...	Fargo	Store	578	800	MF1			11-24-2004	Failed		
465	10000000...	Baltimore	Store	572	794	BB3			11-24-2004	Completed		
466	10000000...	Buffalo	Store	572	794	BB3			11-24-2004	Completed		
415	10000000...	Savannah	Store	180	346	001	706	002	11-17-2004	Completed		

Maintain location move workspace

If RPM created any exceptions or exclusions in order for the location to be moved successfully, those items are viewable in the move results column.

- In the Move Results column, click the button. The conflict review window opens with move results information displayed.

Delete a location move

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

The screenshot shows the 'Maintain Location Move' workspace. It features a 'Location Move List' table with columns for ID, Location, Location Name, Location Type, Zone Group, Old Zone, Old Zone Name, New Zone, New Zone Name, Scheduled Date, Status, Conflict, and Move Results. Below the table are fields for Status, Action (a dropdown menu), and an Update button. At the bottom right of the table area are New and Delete buttons. Below the table is a form for adding new moves with fields for Zone Group, Zone, Location, New Zone, and Effective Date, followed by an Apply button. The Retek logo is visible in the bottom left corner, and Cancel, Save + Repeat, and Done buttons are in the bottom right corner.

ID	Location	Location Name	Location Type	Zone Group	Old Zone	Old Zone Name	New Zone	New Zone Name	Scheduled Date	Status	Conflict	Move Results
451	10000000...	Denver	Store				762	DW 762	11-23-2004	Completed		
452	10000000...	Las Vegas	Store				762	DW 762	11-23-2004	Completed		
461	10000000...	Minneapolis	Store	578	800	MF1			11-24-2004	Failed	⚠	
462	10000000...	Fargo	Store	578	800	MF1			11-24-2004	Failed	⚠	
465	10000000...	Baltimore	Store	572	794	BB3			11-24-2004	Completed		
466	10000000...	Buffalo	Store	572	794	BB3			11-24-2004	Completed		
415	10000000...	Savannah	Store	180	346	001	706	002	11-17-2004	Completed		⚠

Maintain location move workspace



Note: Only location moves in Worksheet status can be deleted.

1. Select a location move with a status of Worksheet.
2. Click **Delete**. A dialog appears asking "The selected Location Move Request will be deleted. Canceling this task will not return these records. Do you wish to continue?"
3. Click **Yes** to delete the location move.

Create calendar

Overview

Calendars are used to define review periods for your pricing strategies. A review period is the amount of time you have to act on auto generated price changes before they expire.

Procedures

Create a calendar

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

Create Calendar

Calendar Setup

* Name

Description

Calendar Setup

* Start Date

* End Date

* Review Period Duration

* Days Between Review Periods

Review Period Setup

Rules

Exception Frequency


New Calendar to Assign to Strategies When Calendar Expires

Name

Create calendar workspace

1. In the Calendar Setup pane, in the Name field, enter a name for the calendar.
2. In the Description field, you can enter a description for the Calendar. Click the button to open an editing window.

Setup the calendar

1. In the Calendar Setup area, in the Start Date field, enter the date the calendar becomes active, or click the calendar  button and select a date.
2. In the End Date field, enter the date the calendar is no longer active.
3. In the Review Period Duration field, enter the length of the review period in days.
4. In the Days Between Review Periods field, enter the number of days between review periods.



Note: The last review period duration plus the days between review periods must exactly reach the end date of the calendar. If this is not the case, the system can automatically adjust the end date, or you can choose to modify the Review Period Duration, Days Between Review Periods or End Date fields yourself.

Setup review periods

1. In the Review Period Setup area, from the Rules drop-down, select the type of rules to apply for the review period.
 - **Inclusion** - Items that meet inclusion candidate rules will be highlighted in the worksheet.
 - **Exclusion** - Items that meet exclusion candidate rules will be excluded from the worksheet.
 - **Both** - Both inclusion and exclusion candidate rules are applied for the review period.
 - **None** - No rules are applied for the review period.
2. In the Exception Frequency field, enter the frequency, in review periods, that RPM should process exceptions from the merchandising system.
 - Enter 1 for every review period.
 - Enter 2 for every other review period.
 - Enter 3 for every third review period.
 - Enter 0 if you never want RPM to process exceptions.

- Click **Calculate Review Periods**. The review periods are calculated and the Review Period Details pane is displayed.

Review Period Details			
Start Date	End Date	Rules	Exception
01/01/2005	01/01/2005	Both	<input checked="" type="checkbox"/>
01/02/2005	01/02/2005	Both	<input checked="" type="checkbox"/>
01/03/2005	01/03/2005	Both	<input checked="" type="checkbox"/>
01/04/2005	01/04/2005	Both	<input checked="" type="checkbox"/>
01/05/2005	01/05/2005	Both	<input checked="" type="checkbox"/>
01/06/2005	01/06/2005	Both	<input checked="" type="checkbox"/>
01/07/2005	01/07/2005	Both	<input checked="" type="checkbox"/>
01/08/2005	01/08/2005	Both	<input checked="" type="checkbox"/>
01/09/2005	01/09/2005	Both	<input checked="" type="checkbox"/>
01/10/2005	01/10/2005	Both	<input checked="" type="checkbox"/>
01/11/2005	01/11/2005	Both	<input checked="" type="checkbox"/>
01/12/2005	01/12/2005	Both	<input checked="" type="checkbox"/>
01/13/2005	01/13/2005	Both	<input checked="" type="checkbox"/>

Review period details pane

- In the Review Period Details pane, in the Rules and Exceptions fields, edit as necessary for each review period.

Complete the calendar

- Click **Done** at the bottom of the workspace. The new calendar is added and the Maintain Calendar workspace is closed.

Maintain calendar

Overview

After you create a calendar, you can maintain the different aspects of that calendar. You can modify the name, description or end date of the calendar. You can also change the rules and exceptions for future review periods.

Procedures

Maintain a calendar

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

The screenshot shows the 'Maintain Calendar' workspace. At the top, there is a 'Calendar List' table with the following columns: Name, Description, Start Date, End Date, Review Period Duration, Days Between Review P, and Expired. The table contains several entries, including 'corin devac test', 'Daily Calendar', 'Demo Calendar', 'Starts 11/24', 'Update Item Attribute', 'Test weekly schedule', and 'Future calendar'. Below the table, there are 'Delete' and 'Edit' buttons. At the bottom of the workspace, there are 'Cancel', 'Save + Repeat', and 'Done' buttons. The Retek logo is visible in the bottom left corner.

Name	Description	Start Date	End Date	Review Period Duration	Days Between Review P	Expired
corin devac test		11/19/2004	11/20/2004	1	1	<input checked="" type="checkbox"/>
Daily Calendar		10/08/2004	10/09/2005	1	0	<input type="checkbox"/>
Demo Calendar	Weekly Calendar	11/12/2004	02/10/2005	5	2	<input type="checkbox"/>
Starts 11/24		11/24/2004	11/29/2004	6	0	<input type="checkbox"/>
Update Item Attribute		10/19/2004	10/17/2005	3	1	<input type="checkbox"/>
Test weekly schedule	Test schedule	10/25/2004	12/26/2004	5	2	<input type="checkbox"/>
Future calendar		09/23/2005	09/25/2005	2	1	<input type="checkbox"/>

Maintain calendar workspace

1. Select the calendar you want to maintain from the Calendar List pane.
2. Click **Edit**. The Calendar Detail and Review Period Details panes are displayed and the fields that can be changed are enabled.

Review Period Details			
Review Period Details			
Start Date	End Date	Rules	Exception
01/01/2005	01/01/2005	Both	<input checked="" type="checkbox"/>
01/02/2005	01/02/2005	Both	<input checked="" type="checkbox"/>
01/03/2005	01/03/2005	Both	<input checked="" type="checkbox"/>
01/04/2005	01/04/2005	Both	<input checked="" type="checkbox"/>
01/05/2005	01/05/2005	Both	<input checked="" type="checkbox"/>
01/06/2005	01/06/2005	Both	<input checked="" type="checkbox"/>
01/07/2005	01/07/2005	Both	<input checked="" type="checkbox"/>
01/08/2005	01/08/2005	Both	<input checked="" type="checkbox"/>
01/09/2005	01/09/2005	Both	<input checked="" type="checkbox"/>
01/10/2005	01/10/2005	Both	<input checked="" type="checkbox"/>
01/11/2005	01/11/2005	Both	<input checked="" type="checkbox"/>
01/12/2005	01/12/2005	Both	<input checked="" type="checkbox"/>
01/13/2005	01/13/2005	Both	<input checked="" type="checkbox"/>

Review period details

Calendar Details	
* Name	2005 Calendar
Description	
<div> <div> Calendar Setup </div> <div> Review Period Setup </div> </div>	
* Start Date	01/01/2005
* End Date	12/31/2005
* Review Period Duration	1
* Days Between Review Periods	0
Rules	Both
Exception Frequency	1
New Calendar to Assign to Strategies When Calendar Expires	
Name	
Calculate Review Periods	

Calendar detail

- Edit the enabled fields as necessary.
- Click **Calculate Review Periods**.
- Click **Done**.

Delete a calendar

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

Maintain Calendar

Calendar List

Name	Description	Start Date	End Date	Review Period Duration	Days Between Review Period	Expired
corin devac test		11/19/2004	11/20/2004	1	1	<input checked="" type="checkbox"/>
Daily Calendar		10/08/2004	10/09/2005	1	0	<input type="checkbox"/>
Demo Calendar	Weekly Calendar	11/12/2004	02/10/2005	5	2	<input type="checkbox"/>
Starts 11/24		11/24/2004	11/29/2004	6	0	<input type="checkbox"/>
Update Item Attribute		10/19/2004	10/17/2005	3	1	<input type="checkbox"/>
Test weekly schedule	Test schedule	10/25/2004	12/26/2004	5	2	<input type="checkbox"/>
Future calendar		09/23/2005	09/25/2005	2	1	<input type="checkbox"/>

Delete Edit

Cancel Save + Repeat Done

Maintain calendar workspace

1. Select the calendar you want to maintain from the list.
2. Click **Delete**. You are prompted to confirm your decision.
3. Click **Yes**. The calendar is deleted.
4. Click **Done** to close the window.

Chapter 5 – 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 pricing events, 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 items in the hierarchy will differ in those secondary 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 workspace. They are also created in the worksheet if there are items or locations brought into the worksheet that are part of the primary area on an area differential strategy.

If you set up the secondary area to be auto-approved, secondary area price changes are conflict checked, and if no conflicts exist, created in approved status. If conflicts exist, the secondary area price change is created in worksheet status. If you set up the secondary area to not be auto-approved, secondary area price changes are 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.
3. 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 aggregation level dialog allows it.



4. 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 area differential price strategy, or click the LOV  button and select a zone group.
 - **Zone:** Enter the ID of the zone(s) that contains the locations you want to add to the area differential price strategy, or click the LOV  button and select a zone.
 - **Location:** Enter the ID of the location that you want to add to the area differential price strategy, or click the LOV  button and select a location.



Note: You can create area differentials at the zone level. Locations are not required.


5. Click **Define Secondary Areas**. The Area Differential Strategy Details pane is displayed.

Area Differential Strategy Details pane

6. Click **New** to enable the fields.
7. In the Price Zone field, enter the ID of the zone that you want to add to the secondary area of the area differential price strategy, or click the LOV  button and select a zone.
8. In the Location field, enter the ID of the location that you want to add to the secondary area of the area differential price strategy, or click the LOV  button and select a location.



Note: You can create area differentials at the zone level. Locations are not required.

9. 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.



Note: Only price guides associated with the selected departments can be selected.

10. 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 all of the items on the strategy at every location 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 secondary area price is different from the primary area 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.

Create a clearance pricing strategy

Overview

Pricing strategies allow you to define how prices are proposed when pricing worksheets are generated. You can define pricing strategies at the department, class, or subclass level to identify the items that are affected by the strategy.

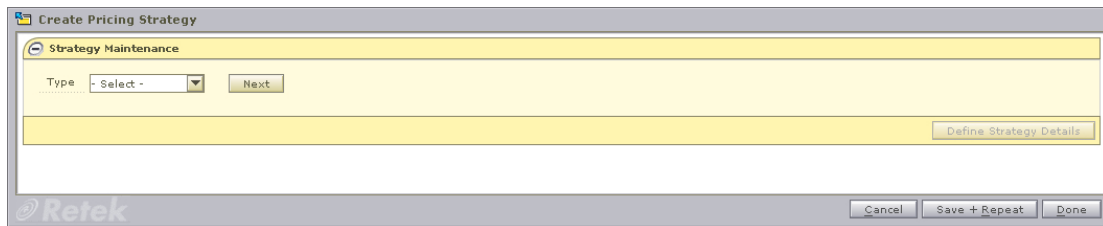
A clearance pricing strategy allows you to define the method used to markdown items.

The lowest merchandise level you can define for a price strategy is determined by the aggregation levels defined for the department.

Procedures

Create a clearance pricing strategy


- ⇒ **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 Clearance.
2. Click **Next**. Additional strategy fields are displayed.

Clearance strategy fields

- Enter the ID of the merchandise level you want to apply the strategy 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 aggregation level dialog allows it.

- Select the locations for the strategy:
 - Zone Group:** Enter the ID of the Zone Group that contains the locations you want to add to the price strategy, or click the LOV  button and select a zone group.
 - Zone:** Enter the ID of the Zone(s) that contains the locations you want to add to the price strategy, or click the LOV  button and select a zone.
 - Location:** Enter the ID of the location(s) that you want to add to the price strategy, or click the LOV  button and select a location.
- In the Price Guides field, enter the ID of the Price Guide field, or click the LOV  button and select a price guide.




Note: Only price guides associated with the selected departments can be selected.

- In the Calendar field, enter the ID of the calendar you want to associate with the strategy, or click the LOV  button and select a calendar.
- In the Suspend field, select the check box to indicate that reviews of the existing strategy are stopped.



Note: Deselect the check box to indicate the review periods should begin with the next review period.

- In the New Calendar field, enter the ID of the calendar you want to associate with the strategy, or click the LOV  button and select a calendar.



Note: You must select the Suspend check box before you can add a new calendar.

- Click **Define Strategy Details**. The Clearance Strategy Details pane is displayed.

Clearance Strategy Details

Markdown Percent: Regular Price (dropdown)
Discount Percent: (text box)

Markdown Number: (text box)

Remove Markdown Edit Add Row

Apply

Clearance Strategies	
Markdown Number	Discount Percent

Clearance strategy details

Define clearance strategy details

- In the Markdown Percent field, select the price from which the clearance price is calculated.
- Click **Add Row**.
- In the Discount Percent field, enter the percent of the markdown.
- Click **Apply**.



Note: If the price from which the clearance price is calculated is Regular Retail, the Discount Percent fields must increase with each markdown added.

Create a competitive pricing strategy

Overview

Pricing strategies allow you to define how prices are proposed when pricing worksheets are generated. You can define pricing strategies at the department, class, or subclass level to identify the items that are affected by the strategy.

A competitive pricing strategy allows you to define your pricing strategy for items based on your competitor's prices



Note: All locations in a competitive pricing strategy must use the same currency.

For competitive strategies, you can assign reference competitors to the strategy. This information allows you to compare the proposed prices to the prices available from other retailers. If the proposed prices vary from the target percentages defined for the reference competitors, you are informed so you can adjust the price in the pricing worksheet.

The lowest merchandise level you can define for a price strategy is determined by the aggregation levels defined for the department.

Procedures


Define the merchandise levels and locations for the pricing strategy

⇒ **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 Competitive.
2. Click **Next**. Additional strategy fields are displayed.

Competitive strategy fields

- Enter the ID of the merchandise level you want to apply the strategy 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 for the strategy:
 - Zone Group:** Enter the ID of the Zone Group that contains the locations you want to add to the price strategy, 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 strategy, or click the LOV  button and select a zone.
 - Location:** Enter the ID of the location that you want to add to the price strategy, or click the LOV  button and select a location.
- In the Price Guides field, enter the ID of the Price Guide field, or click the LOV  button and select a price guide.




Note: Only price guides associated with the selected departments can be selected.

- In the Calendar field, enter the ID of the calendar you want to associate with the strategy, or click the LOV  button and select a calendar.
- In the Suspend field, select the check box to indicate that reviews of the existing strategy are stopped.



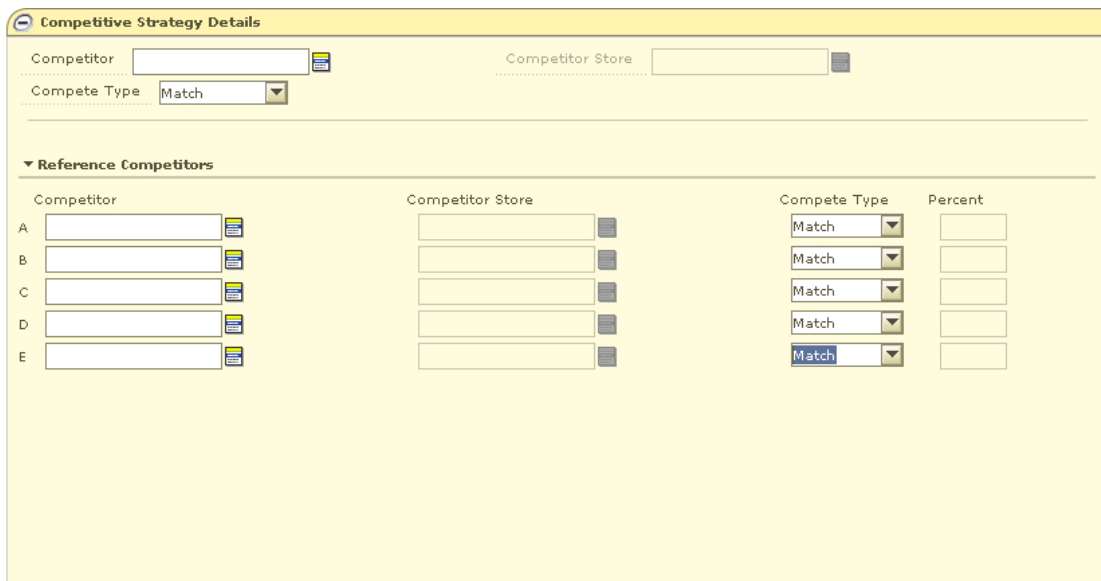
Note: Deselect the check box to indicate the review periods should begin with the next review period.

- In the New Calendar field, enter the ID of the new calendar you want to associate with the strategy, or click the LOV  button and select a calendar.



Note: you must select the Suspend check box before you can add a new calendar.


- Click **Define Strategy Details**. The Competitive Strategy Details pane is displayed.



Competitive Strategy Details			
Competitor	<input type="text"/>	Competitor Store	<input type="text"/>
Compete Type	Match		
▼ Reference Competitors			
Competitor	Competitor Store	Compete Type	Percent
A	<input type="text"/>	Match	<input type="text"/>
B	<input type="text"/>	Match	<input type="text"/>
C	<input type="text"/>	Match	<input type="text"/>
D	<input type="text"/>	Match	<input type="text"/>
E	<input type="text"/>	Match	<input type="text"/>

Competitive strategy details

Create the competitive price strategy

1. In the Competitor field, enter the ID of the competitor or click the LOV  button and select a competitor.
2. In the Competitor Store field, enter the ID of the store that prices are being matched against.



Note: The currency at the store must be the same as the locations previously selected.

3. In the Compete Type, select how the price strategy determines the prices:
 - **Match:** Prices are proposed to be the same as the competitor's prices.
 - **Price Above:** Prices are proposed to be a percentage above the competitor's prices.
 - **Price Below:** Prices are proposed to be a percentage below the competitor's prices.
 - **Price by Code:** Prices are proposed by the market basket code for the merchandise hierarchy/location.

Define match strategy details

1. Define reference competitors as necessary.
2. Click **Done** to save any changes and close the workspace.

Define price above or price below strategy details

1. In the Compete Percent field, enter the percent above or below the competitor's price that the new price is set at.
2. Setup the acceptable range:



Note: Acceptable range is the amount by percentage that a retail price can vary from a competitor before a price change is proposed.

- a. In the Acceptable Range From field, enter the bottom of the range.
 - b. In the Acceptable Range To field, enter the top of the range.
3. Define reference competitors as necessary.
 4. Click **Done** to save any changes and close the workspace.

Define price by code strategy details

1. In the Code field, select the market basket code you want to use to set the price.
2. In the Compete Type, select how the price strategy determines the prices:
 - **Match:** Prices are proposed to be the same as the competitor's prices.
 - **Price Above:** Prices are proposed to be a percentage above the competitor's prices.
 - **Price Below:** Prices are proposed to be a percentage below the competitor's prices.
3. In the Compete Percent field, enter the percent above or below the competitor's price that the new price is set at.



4. Setup the acceptable range:



Note: Acceptable range is the amount by percentage that a retail price can vary from a competitor before a price change is proposed.

- a. In the Acceptable Range From field, enter the bottom of the range.
 - b. In the Acceptable Range To field, enter the top of the range.
5. Define reference competitors as necessary.
6. Click **Done** to save any changes and close the workspace.

Define reference competitors

1. In the Reference Competitors section, enter the ID of the competitor in the Competitor field, or click the LOV  button and select a competitor.
2. In the Competitor Store field, enter the ID of the store, or click the LOV  button and select a store.
3. In the Compete Type, select how the price strategy determines the prices:
 - **Match:** Prices are proposed to be the same as the competitor's prices.
 - **Price Above:** Prices are proposed to be a percentage above the competitor's prices.
 - **Price Below:** Prices are proposed to be a percentage below the competitor's prices.
4. If you selected Price Above or Price Below, enter the percent above or below the competitor's price that the new price is compared.
5. Click **Done** to save any changes and close the workspace.

Create a margin pricing strategy

Overview

Pricing strategies allow you to define how prices are proposed when pricing worksheets are generated. You can define pricing strategies at the department, class, or subclass level to identify the items that are affected by the strategy. The lowest merchandise level you can define for a price strategy is determined by the aggregation levels defined for the department.

A margin pricing strategy allows you to define the pricing strategy for items based on margin targets.

Procedures


Create a margin pricing strategy

⇒ **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 Margin.
2. Click **Next**. Additional strategy fields are displayed.

Margin strategy fields

3. Enter the ID of the merchandise level you want to apply the strategy 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.

4. Select the locations for the strategy:
 - **Zone Group:** Enter the ID of the Zone Group that contains the locations you want to add to the price strategy, 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 strategy, or click the LOV  button and select a zone.
 - **Location:** Enter the ID of the location that you want to add to the price strategy, or click the LOV  button and select a location.
5. In the Price Guides field, enter the ID of the Price Guide field, or click the LOV  button and select a price guide.




Note: Only price guides associated with the selected departments can be selected.

6. In the Calendar field, enter the ID of the calendar you want to associate with the strategy, or click the LOV  button and select a calendar.
7. In the Suspend field, select the check box to indicate that reviews of the existing strategy are stopped.



Note: Deselect the check box to indicate the review periods should begin in the next period.

8. In the New Calendar field, enter the ID of the calendar you want to associate with the strategy, or click the LOV  button and select a calendar.



Note: you must select the Suspend check box before you can add a new calendar.

9. Click **Define Strategy Details**. The Margin Strategy Details pane is displayed.

Margin Strategy Details

Code

- Select -

Acceptable Range From

Margin Target

Acceptable Range To

Apply











Add Row

Delete

Margin Strategy Details

Code	Margin Target	Acceptable Range From	Acceptable Range To

▼ Reference Competitors

Competitor	Competitor Store	Compete Type	Percent
A 		Match	
B 		Match	
C 		Match	
D 		Match	
E 		Match	

Margin strategy details

10. In the Code field, select the market basket code you want to use to set the price.
11. In the Margin Target field, enter the percent of margin you want to earn on the item/location.
12. Setup the acceptable range:
 - a. In the Acceptable Range From field, enter the bottom of the range.
 - b. In the Acceptable Range To field, enter the top of the range.
13. Define reference competitors as necessary.
14. Click **Done** to save any changes and close the workspace.



Note: Acceptable range is the amount by percentage that a margin can vary from the target before a price change is proposed.

Maintain price strategies

Overview

Pricing strategies allow you to define how prices are proposed when pricing worksheets are generated. You can define pricing strategies at the department, class, or subclass level to identify the items that are affected by the strategy. After you have created a price strategy, you can maintain different aspects of the price strategy.

Procedures

Edit an area differential 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. At the top, there's a 'Strategy Maintenance' tab. Below it is a 'Pricing Strategies List' table. The table has columns for Department, Class, Subclass, Zone Group, Zone, Location, Type, Price Guide, Calendar, and Calendar Status. Each column has a 'Filter by:' dropdown menu. The table contains several rows of data, including entries for 'Kitchenware', 'Glassware', 'Candida...', 'SIG Meat', 'Test Dep ...', 'Cost Dept', 'Small Ap...', 'Retail Dept', and 'New Zone'. At the bottom of the table, there are 'Delete' and 'Edit' buttons. The Retek logo is visible in the bottom left corner, and 'Cancel', 'Save + Repeat', and 'Done' buttons are in the bottom right corner.

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 Pricing Strategies List, select the area differential strategy you want to maintain.
2. Click **Edit**, or double-click the strategy selected. A second Strategy Maintenance pane is displayed and the fields that can be changed are enabled.

Strategy Maintenance

Type: Area Differential [Next]

* Department: 1818 [+CJT department] * Zone Group: 119 [DW currency]
 Class: 1000 [+Heather class] Zone: 224 [DW USD]
 Subclass: 1000 [+Henry subclass] Location: []

Zone ID	Zone Name	Location ID	Location Name	Differential	Percent	Auto Approve	Price Guide	Create Price Change
223	DW AUS			Price Higher	10%	<input checked="" type="checkbox"/>		<input type="checkbox"/>

[New] [Edit] [Delete]

Price Zone ID: [] [+]
 Location: [] [+]
 Price Guides: [] [+]
 Create Price Changes: ☐

Differential: [- Select -]
 Percent: []
 Auto Approve: ☐
 Effective Date: []

► Item Exclusion

[Apply]

Retek [Cancel] [Save + Repeat] [Done]

3. If you selected an area differential strategy, select the location you want to update.

Remove a location from an area differential strategy

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.

Edit a clearance price strategy

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

Maintain Pricing Strategy

Strategy Maintenance

Pricing Strategies List

Department	Class	Subclass	Zone Group	Zone	Location	Type	Price Guide	Calendar	Calendar Status
Filter by:	Filter by:	Filter by:	Filter by:	Filter by:	Filter by:	Filter by:	Filter by:	Filter by:	Filter by:
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

Delete Edit

Cancel Save + Repeat Done

Maintain Pricing Strategy workspace

1. From the Pricing Strategies List, select the clearance strategy you want to maintain.
2. Click **Edit**, or double-click the strategy selected. A second Strategy Maintenance pane is displayed and the fields that can be changed are enabled.

Strategy Maintenance

Type: Clearance Next

* Department: 20 + Merch Extract R... * Zone Group: 586 MF5

Class: + Zone: 808 + MF5

Subclass: + Location: +

Price Guide: Suspend: ☒

Calendar: Daily Calendar New Calendar:

Markdown Percent: Regular Price Discount Percent:

Remove Markdown Edit Add Row


Apply

Clearance Strategies	
Markdown Number	Discount Percent
1	2%
2	3%

Cancel Save + Repeat Done

3. Make necessary changes


Edit a price guide

- Change or enter a price guide name or click the LOV  button and select the appropriate price guide if necessary.

Change calendars



Note: In order to specify a new calendar, the existing calendar must be suspended.

- Select the Suspend checkbox.
- Enter a calendar name, or click the LOV  button and select a calendar

Edit a markdown

- Select the Markdown number from the Clearance Strategies table.
- Click **Edit**. The Discount Percent field is enabled.
- Edit the discount percent.
- Click **Apply**.

Delete a markdown

- Select the highest Markdown number from the Clearance Strategies table.
- Click **Remove Markdown**.
- Click **Apply**.

Edit a competitive pricing 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. At the top, there's a 'Strategy Maintenance' header. Below it is a 'Pricing Strategies List' table. The table has columns for Department, Class, Subclass, Zone Group, Zone, Location, Type, Price Guide, Calendar, and Calendar Status. Each column has a 'Filter by:' dropdown menu. The table contains 20 rows of data. At the bottom of the table, there are 'Delete' and 'Edit' buttons. The Retek logo is visible in the bottom left corner, and 'Cancel', 'Save + Repeat', and 'Done' buttons are in the bottom right corner.

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 Pricing Strategies List, select the competitive strategy you want to maintain.
2. Click **Edit**, or double-click the strategy selected. A second Strategy Maintenance pane is displayed and the fields that can be changed are enabled.

Strategy Maintenance

Type: Competitive [Next]

* Department: 13 [SLH Test Depar...] * Zone Group: 15 [Shawshank]
 Class: [] Zone: 10 [+Land O Lakes]
 Subclass: [] Location: []

Price Guide: [] Suspend: ☐
 Calendar: Daily Calendar [] New Calendar: []

Competitor: 301 [Corin's Compet...] Competitor Store: 601 [A]
 Compete Type: Match

▼ Reference Competitors

Competitor	Competitor Store	Compete Type	Percent
A []	[]	Match	[]
B []	[]	Match	[]
C []	[]	Match	[]
D []	[]	Match	[]
E []	[]	Match	[]

Retek [Cancel] [Save + Repeat] [Done]

3. Make necessary changes.

Edit a price guide

- Enter the price guide name or click the LOV button and select the appropriate price guide.

Change calendars



Note: In order to specify a new calendar, the existing calendar must be suspended.

- Select the Suspend checkbox.
- Enter a calendar name, or click the LOV button and select a calendar

Edit a competitor

- In the Competitor field, enter or change the competitor ID, or click the LOV button and select the appropriate competitor.
- In the Competitor Store field, enter a competitor store ID, or click the LOV button and select the appropriate store.
- In the Compete Type drop-down, select the compete type.
- For Price Above and Price Below compete types, setup the acceptable range:



Note: Acceptable range is the amount by percentage that a retail price can vary from a competitor before a price change is proposed.

- In the Acceptable Range From field, enter the bottom of the range.
- In the Acceptable Range To field, enter the top of the range.

Edit reference competitors

- Define reference competitors as necessary.

Complete the competitive price strategy

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

Edit a margin pricing 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. At the top, there's a 'Strategy Maintenance' header. Below it is a 'Pricing Strategies List' table. The table has columns for Department, Class, Subclass, Zone Group, Zone, Location, Type, Price Guide, Calendar, and Calendar Status. Each column has a 'Filter by:' dropdown menu. The table contains 20 rows of data. At the bottom of the table, there are 'Delete' and 'Edit' buttons. Below the table, there's a 'Cancel', 'Save + Repeat', and 'Done' button bar. The Retek logo is visible in the bottom left corner.

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 Pricing Strategies List, select the margin strategy you want to maintain.
2. Click **Edit**, or double-click the strategy selected. A second Strategy Maintenance pane is displayed and the fields that can be changed are enabled.

Strategy Maintenance

Type: Margin Next

* Department: 1 + Corin's Depart... * Zone Group: 13 Corin's ZG

Class: + Zone: 8 + Z1

Subclass: + Location: +

Price Guide: Suspend: ☒ New Calendar:

Calendar: Daily Calendar

Code: - Select - Acceptable Range From:

Margin Target: Acceptable Range To:

Apply Add Row Delete

Margin Strategy Details

Code	Margin Target	Acceptable Range From	Acceptable Range To
No Code	5%	4%	6%

Reference Competitors

Competitor	Competitor Store	Compete Type	Percent
A 		Match	
B 		Match	
C 		Match	
D 		Match	
E 		Match	

Cancel Save + Repeat Done

3. Make necessary changes.


Edit a price guide

- Enter the price guide name or click the LOV  button and select the appropriate price guide.

Change calendars



Note: In order to specify a new calendar, the existing calendar must be suspended.

- Select the Suspend checkbox.
- Enter a calendar name, or click the LOV  button and select a calendar

Edit margin details

1. Select a row in the Margin Strategy Details table.
2. In the Margin Target field, enter the percent of margin you want to earn on the item/location.



Note: Acceptable range is the amount by percentage that a margin can vary from the target before a price change is proposed.

3. In the Acceptable Range From field, enter the bottom of the range.
4. In the Acceptable Range To field, enter the bottom of the range.
5. Click **Apply**.

Delete margin details

1. Select the margin detail from the Margin Strategy Details table.
2. Click **Delete**. The row is removed from the table.

Edit reference competitors

- Define reference competitors as necessary.

Complete the margin price strategy

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

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 price strategy you want to delete.
2. Click **Delete**. You are prompted to confirm your decision.
3. Click **Yes**.
4. Click **Done** to close the window.

Chapter 6 – Worksheets

Worksheet status

Overview

RPM uses strategies, calendars, and item/location information to automatically generate price change worksheets. The Worksheet functionality allows you to maintain the proposed price changes automatically generated by RPM.

From the Worksheet Status workspace you can:

- Submit a price change worksheet for approval
- Approve a price change worksheet
- Reject a price change worksheet
- Reset a price change worksheet
- Delete a price change worksheet

Procedures

Maintain a pricing worksheet

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

The screenshot displays the 'Worksheet Status' workspace. At the top, there are fields for 'Reason' and 'Action' (set to '- Select -') with an 'Apply' button. Below this is a table with columns: Merchandise Level, Merchandise ID, Location Level, Location ID, Location, Status, Conflict, Last Review Date, Reason, Price Change Amount, Price Change SOH, and Price Change. The table contains 10 rows of data. At the bottom, there are summary statistics: Total Price Change Amount (\$720,353.40), Total Price Change SOH (9730), and Total Price Change Items (100). There are also buttons for 'Select All', 'Unselect All', 'Worksheet Detail', 'Cancel', and 'Done'.

Merchandise Level	Merchandise ID	Location Level	Location ID	Location	Status	Conflict	Last Review Date	Reason	Price Change Amount	Price Change SOH	Price Change
Subclass	1 Storm	Store	1000000...	Minnea...	New		11-24-2004		\$0.00	0	12
Class	2 Corin's Class 2	Zone	401	Mpls a...	New		11-24-2004		\$0.00	0	1
Department	13 SLH Test Dep...	Zone	10	Land O...	New		11-24-2004		\$0.00	0	0
Subclass	1 Storm	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	12
Subclass	1 Puff	Store	1000000...	Fargo	New		11-24-2004		(\$83,894.00)	375	8
Department	1221 Kitchenware	Store	1000000...	Buffalo	New		11-24-2004		\$0.00	0	0
Subclass	1 Puff	Store	1000000...	Minnea...	New		11-24-2004		(\$291,175.00)	775	10
Department	1704 *Candidat...	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	29
Department	1221 Kitchenware	Zone	401	Mpls a...	New		11-29-2004		(\$345,284.40)	8580	6
Department	1704 *Candidat...	Store	1000000...	Houston	New		11-24-2004		\$0.00	0	22

Summary Statistics:

- Total Price Change Amount: (\$720,353.40)
- Total Price Change SOH: 9730
- Total Price Change Items: 100

Worksheet status workspace

1. Select the worksheet you want to maintain.



Note: You can select multiple worksheets as long as they are for the same department and currency.

2. Click **Worksheet Detail** to maintain the details of the worksheet.

Submit a Pricing Worksheet for approval

The Pricing Worksheet status must be In Progress to enable the Submit action. To change the status of the Pricing Worksheet from New or Updated to In Progress, you need to have at least one row or item selected for price change.

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

Merchandise Level	Merchandise ID	Location Level	Location ID	Location	Status	Conflict	Last Review Date	Reason	Price Change Amount	Price Change SOH	Price Change
Filter by:	Filter by:	Filter by:	Filter by:	Filter	Filter	Filter	Filter by:				
Subclass	1 Storm	Store	1000000...	Minnea...	New		11-24-2004		\$0.00	0	12
Class	2 Corin's Class 2	Zone	401	Mpls a...	New		11-24-2004		\$0.00	0	1
Department	13 SLH Test Dep...	Zone	10	Land O...	New		11-24-2004		\$0.00	0	0
Subclass	1 Storm	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	12
Subclass	1 Puff	Store	1000000...	Fargo	New		11-24-2004		(\$83,894.00)	375	8
Department	1221 Kitchenware	Store	1000000...	Buffalo	New		11-24-2004		\$0.00	0	0
Subclass	1 Puff	Store	1000000...	Minnea...	New		11-24-2004		(\$291,175.00)	775	10
Department	1704 *Candidat...	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	29
Department	1221 Kitchenware	Zone	401	Mpls a...	New		11-29-2004		(\$345,284.40)	8580	6
Department	1704 *Candidat...	Store	1000000...	Houston	New		11-24-2004		\$0.00	0	22

Total Price Change Amount (\$720,353.40)
 Total Price Change SOH 9730
 Total Price Change Items 100

Worksheet status workspace

1. Select the worksheet that you want to submit.
2. Review the information in the Worksheet Status window to ensure that it is correct.
3. From the Action drop-down list, select Submit.
4. Click **Apply**. The status is changed to Submitted and the Pricing Worksheet is ready for approval.



Note: Before the status changes to Submitted, RPM checks the Pricing Worksheet to ensure that there are no conflicts.

The status options that are available from the Action drop-down list change based on current status of the worksheet's details.

Approve a Pricing Worksheet



Note: The Pricing Worksheet status must be in either Submitted or Delete Pending status before you can select the approve action.

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

The screenshot shows the 'Worksheet Status' workspace. At the top, there are fields for 'Reason' and 'Action' (set to '- Select -'), and an 'Apply' button. Below this is a table with columns: Merchandise Level, Merchandise ID, Location Level, Location ID, Location, Status, Conflict, Last Review Date, Reason, Price Change Amount, Price Change SOH, and Price Change. The table contains 12 rows of data. At the bottom, there are summary statistics: Total Price Change Amount (\$720,353.40), Total Price Change SOH (9730), and Total Price Change Items (100). There are also buttons for 'Select All', 'Unselect All', and 'Worksheet Detail'.

Merchandise Level	Merchandise ID	Location Level	Location ID	Location	Status	Conflict	Last Review Date	Reason	Price Change Amount	Price Change SOH	Price Change
Subclass	1 Storm	Store	1000000...	Minnea...	New		11-24-2004		\$0.00	0	12
Class	2 Corin's Class 2	Zone	401	Mpls a...	New		11-24-2004		\$0.00	0	1
Department	13 SLH Test Dep...	Zone	10	Land O...	New		11-24-2004		\$0.00	0	0
Subclass	1 Storm	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	12
Subclass	1 Puff	Store	1000000...	Fargo	New		11-24-2004		(\$83,894.00)	375	8
Department	1221 Kitchenware	Store	1000000...	Buffalo	New		11-24-2004		\$0.00	0	0
Subclass	1 Puff	Store	1000000...	Minnea...	New		11-24-2004		(\$291,175.00)	775	10
Department	1704 *Candidat...	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	29
Department	1221 Kitchenware	Zone	401	Mpls a...	New		11-29-2004		(\$345,284.40)	8580	6
Department	1704 *Candidat...	Store	1000000...	Houston	New		11-24-2004		\$0.00	0	22

Summary Statistics:

- Total Price Change Amount: (\$720,353.40)
- Total Price Change SOH: 9730
- Total Price Change Items: 100

Worksheet status workspace

1. Select the worksheet that you want to approve.
2. When you are ready to approve the submitted or delete pending Pricing Worksheet, select Approve.
3. Click **Apply**. The Pricing Worksheet information is saved and applied.



Note: For worksheets in Submitted status, before the status changes to Approved, RPM checks the Pricing Worksheet to ensure that there are no conflicts. Delete pending status worksheets are not conflict checked before being moved to Deleted status..

Reject a Pricing Worksheet

You can reject a Pricing Worksheet that has a status of Submitted or Delete Pending. When you reject a submitted or delete pending Pricing Worksheet, its status changes to Rejected or Delete Rejected.



Note: If you want to work with the Pricing Worksheet when its status is Rejected, Reset the status of the Pricing Worksheet (see the procedure below).

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


Merchandise Level	Merchandise ID	Location Level	Location ID	Location	Status	Conflict	Last Review Date	Reason	Price Change Amount	Price Change SOH	Price Change
Filter by:	Filter by:	Filter by:	Filter by:	Filter	Filter	Filter	Filter by:				
Subclass	1 Storm	Store	1000000...	Minnea...	New		11-24-2004		\$0.00	0	12
Class	2 Corin's Class 2	Zone	401	Mpls a...	New		11-24-2004		\$0.00	0	1
Department	13 SLH Test Dep...	Zone	10	Land O...	New		11-24-2004		\$0.00	0	0
Subclass	1 Storm	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	12
Subclass	1 Puff	Store	1000000...	Fargo	New		11-24-2004		(\$83,894.00)	375	8
Department	1221 Kitchenware	Store	1000000...	Buffalo	New		11-24-2004		\$0.00	0	0
Subclass	1 Puff	Store	1000000...	Minnea...	New		11-24-2004		(\$291,175.00)	775	10
Department	1704 *Candidat...	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	29
Department	1221 Kitchenware	Zone	401	Mpls a...	New		11-29-2004		(\$345,284.40)	8580	6
Department	1704 *Candidat...	Store	1000000...	Houston	New		11-24-2004		\$0.00	0	22

Total Price Change Amount (\$720,353.40)
 Total Price Change SOH 9730
 Total Price Change Items 100

Select All Unselect All Worksheet Detail

Cancel Done

Worksheet status workspace

1. Select the worksheet that you want to reject.
2. You can enter a Reason for the rejection in the Reason field. Click the  button to open an editing window where you can enter a reason up to 250 characters long.
3. From the Action drop-down list, select Reject.
4. Click **Apply**. The status of the Pricing Worksheet changes to Rejected or Delete Rejected.

Reset the status of a Pricing Worksheet

Use the Reset action to return the worksheet to its previous status.

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

The screenshot shows the 'Worksheet Status' window. At the top, there are fields for 'Reason' and 'Action' (set to '- Select -') with an 'Apply' button. Below this is a table with 12 columns: Merchandise Level, Merchandise ID, Location Level, Location ID, Location, Status, Conflict, Last Review Date, Reason, Price Change Amount, Price Change SOH, and Price Change. The table contains 12 rows of data. At the bottom, there are summary statistics: Total Price Change Amount (\$720,353.40), Total Price Change SOH (9730), and Total Price Change Items (100). There are also buttons for 'Select All', 'Unselect All', and 'Worksheet Detail'.

Merchandise Level	Merchandise ID	Location Level	Location ID	Location	Status	Conflict	Last Review Date	Reason	Price Change Amount	Price Change SOH	Price Change
Subclass	1 Storm	Store	1000000...	Minnea...	New		11-24-2004		\$0.00	0	12
Class	2 Corin's Class 2	Zone	401	Mpls a...	New		11-24-2004		\$0.00	0	1
Department	13 SLH Test Dep...	Zone	10	Land O...	New		11-24-2004		\$0.00	0	0
Subclass	1 Storm	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	12
Subclass	1 Puff	Store	1000000...	Fargo	New		11-24-2004		(\$83,894.00)	375	8
Department	1221 Kitchenware	Store	1000000...	Buffalo	New		11-24-2004		\$0.00	0	0
Subclass	1 Puff	Store	1000000...	Minnea...	New		11-24-2004		(\$291,175.00)	775	10
Department	1704 *Candidat...	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	29
Department	1221 Kitchenware	Zone	401	Mpls a...	New		11-29-2004		(\$345,284.40)	8580	6
Department	1704 *Candidat...	Store	1000000...	Houston	New		11-24-2004		\$0.00	0	22

Summary Statistics:

- Total Price Change Amount: (\$720,353.40)
- Total Price Change SOH: 9730
- Total Price Change Items: 100

Worksheet status workspace

1. Select the worksheet that you need to reset the status of.
2. From the Action drop-down list, select Reset.
3. Click **Apply**. The Worksheet Status window refreshes and the worksheet is returned to its previous status.

Delete a Pricing Worksheet

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

Worksheet Status

Reason: Apply

Action: - Select -

Merchandise Level	Merchandise ID	Location Level	Location ID	Location	Status	Conflict	Last Review Date	Reason	Price Change Amount	Price Change SOH	Price Change
Filter by:	Filter by:	Filter by:	Filter by:	Filter	Filter	Filter	Filter by:				
Subclass	1 Storm	Store	1000000...	Minnea...	New		11-24-2004		\$0.00	0	12
Class	2 Corin's Class 2	Zone	401	Mpls a...	New		11-24-2004		\$0.00	0	1
Department	13 SLH Test Dep...	Zone	10	Land O...	New		11-24-2004		\$0.00	0	0
Subclass	1 Storm	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	12
Subclass	1 Puff	Store	1000000...	Fargo	New		11-24-2004		(\$83,894.00)	375	8
Department	1221 Kitchenware	Store	1000000...	Buffalo	New		11-24-2004		\$0.00	0	0
Subclass	1 Puff	Store	1000000...	Minnea...	New		11-24-2004		(\$291,175.00)	775	10
Department	1704 *Candidat...	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	29
Department	1221 Kitchenware	Zone	401	Mpls a...	New		11-29-2004		(\$345,284.40)	8580	6
Department	1704 *Candidat...	Store	1000000...	Houston	New		11-24-2004		\$0.00	0	22

Select All Unselect All Worksheet Detail

Total Price Change Amount: (\$720,353.40)
 Total Price Change SOH: 9730
 Total Price Change Items: 100

Cancel Done

Worksheet status workspace

1. Select the worksheet that you want to delete.
2. From the Action drop-down list, select Delete.
3. Click **Apply**. The Pricing Worksheet is moved to Delete Pending status and is ready to have your deletion approved or rejected.



Note: The options that are available from the Action drop-down list change based on worksheet's current status.

Worksheet detail

Overview

The Worksheet Detail workspace allows you to:

- Review the auto generated price change proposals.
- Review items that broke rules or were exceptions.
- Make clearance decisions.
- Accept the recommendations or delete the Pricing Worksheet.
- Examine the information about price change candidates and make decisions about which items to change and what retail prices to set.
- Modify column values and
- Perform what-if analysis on the Worksheet to help you make the best pricing decisions
- Export the worksheet to a Comma Separated Value (csv) file that can be opened in other applications such as spreadsheets and work processors.

Procedures

Maintain worksheet details

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

The screenshot shows the 'Worksheet Status' workspace. At the top, there are fields for 'Reason' and 'Action' (a dropdown menu), and an 'Apply' button. Below this is a table with the following columns: Merchandise Level, Merchandise ID, Location Level, Location ID, Location, Status, Conflict, Last Review Date, Reason, Price Change Amount, Price Change SOH, and Price Change. The table contains 12 rows of data. Below the table, there are three summary statistics: Total Price Change Amount (\$720,353.40), Total Price Change SOH (9730), and Total Price Change Items (100). At the bottom right, there are buttons for 'Select All', 'Unselect All', and 'Worksheet Detail'. The Retek logo is visible in the bottom left corner, and 'Cancel' and 'Done' buttons are in the bottom right corner.

Merchandise Level	Merchandise ID	Location Level	Location ID	Location	Status	Conflict	Last Review Date	Reason	Price Change Amount	Price Change SOH	Price Change
Subclass	1 Storm	Store	1000000...	Minnea...	New		11-24-2004		\$0.00	0	12
Class	2 Corin's Class 2	Zone	401	Mpls a...	New		11-24-2004		\$0.00	0	1
Department	13 SLH Test Dep...	Zone	10	Land O...	New		11-24-2004		\$0.00	0	0
Subclass	1 Storm	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	12
Subclass	1 Puff	Store	1000000...	Fargo	New		11-24-2004		(\$83,894.00)	375	8
Department	1221 Kitchenware	Store	1000000...	Buffalo	New		11-24-2004		\$0.00	0	0
Subclass	1 Puff	Store	1000000...	Minnea...	New		11-24-2004		(\$291,175.00)	775	10
Department	1704 *Candidat...	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	29
Department	1221 Kitchenware	Zone	401	Mpls a...	New		11-29-2004		(\$345,284.40)	8580	6
Department	1704 *Candidat...	Store	1000000...	Houston	New		11-24-2004		\$0.00	0	22

Total Price Change Amount (\$720,353.40)
Total Price Change SOH 9730
Total Price Change Items 100

Worksheet status workspace

1. Select the worksheet you want to view the details of. You can select multiple worksheets or click **Select All** to select of all the worksheets.
2. Click **Worksheet Detail**. The Worksheet Detail workspace is displayed.

Worksheet Details

Worksheet Details

ItemFirstView Save View Item Level Tran Level Diff Type

New Retail	Item ID	% off Regular Ret	% off Basis Retail	Base Cost	Basis Cost	Class Id	Class Description	Clearance Indicate	Clear
Filter by:	Filter by:	Filter by:	Filter by:	Filter by:	Filter by:	Filter by:	Filter by:	Filter by:	Filter
180.00	100140078	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140086	-10%	-10%	200.00	200.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140094	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140107	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140115	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140123	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140131	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140140	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140158	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140174	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140182	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140191	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	

Unselect All Select All Reset Data What If

Retek Cancel Save Done

Worksheet detail workspace

3. Edit the enabled fields as necessary.
4. Click **Save**. Your changes to the worksheet are saved and the Worksheet Status workspace is displayed.

View totals

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

Worksheet Status

Reason: Apply

Action: Filter

Merchandise Level	Merchandise ID	Location Level	Location ID	Location	Status	Conflict	Last Review Date	Reason	Price Change Amount	Price Change SOH	Price Change
Filter by:	Filter by:	Filter by:	Filter by:	Filter	Filter	Filter	Filter by:				
Subclass	1 Storm	Store	1000000...	Minnea...	New		11-24-2004		\$0.00	0	12
Class	2 Corin's Class 2	Zone	401	Mpls a...	New		11-24-2004		\$0.00	0	1
Department	13 SLH Test Dep...	Zone	10	Land O...	New		11-24-2004		\$0.00	0	0
Subclass	1 Storm	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	12
Subclass	1 Puff	Store	1000000...	Fargo	New		11-24-2004		(\$83,894.00)	375	8
Department	1221 Kitchenware	Store	1000000...	Buffalo	New		11-24-2004		\$0.00	0	0
Subclass	1 Puff	Store	1000000...	Minnea...	New		11-24-2004		(\$291,175.00)	775	10
Department	1704 *Candidat...	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	29
Department	1221 Kitchenware	Zone	401	Mpls a...	New		11-29-2004		(\$345,284.40)	8580	6
Department	1704 *Candidat...	Store	1000000...	Houston	New		11-24-2004		\$0.00	0	22

Select All Unselect All Worksheet Detail

Total Price Change Amount: (\$720,353.40)

Total Price Change SOH: 9730

Total Price Change Items: 100

Cancel Done

1. Select the worksheet you want to view the details of. You can select multiple worksheets or click **Select All** to select of all the worksheets.
2. Click **Worksheet Detail**. The Worksheet Detail workspace is displayed.

Worksheet Details

Worksheet Details

ItemFirstView

Save View

Item Level

Tran Level

Diff Type

Filter by:

Filter by:

Filter by:

Filter by:

Filter by:

Filter by:

Filter by:

Filter by:

Filter by:

Filter by:

Filter by:

New Retail	Item ID	% off Regular Ret	% off Basis Retail	Base Cost	Basis Cost	Class Id	Class Description	Clearance Indicate	Clear
180.00	100140078	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140086	-10%	-10%	200.00	200.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140094	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140107	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140115	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140123	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140131	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140140	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140158	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140174	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140182	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140191	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	

Unselect All

Select All

Reset Data

What If


Retek


Cancel

Save

Done

Worksheet detail workspace

3. Select the row you want to view totals for by clicking the box  to the left of the row. You can select multiple rows. Click **Select All** to select all the rows.

 **Note:** If no items are selected, the totals are displayed for all items where a price change would occur.

4. Click the Totals  button. The Totals window is displayed.

The screenshot shows a software window titled "totals". It features three tabs at the top: "Price Change Totals", "Sales Totals", and "Competitive Analysis totals". The "Price Change Totals" tab is currently selected. Below the tabs is a table with the following headers: "Zone ID", "Zone Name", "Price Change Amount", "Price Change SOH", and "Price Change Items". The table body is empty. At the bottom right of the window, there are two buttons: "Recalculate Total" and "Done".

Totals window

View price change totals

1. Select the Price Change Totals tab. The totals for all of the item rows that you selected are displayed on the Totals window.
2. Click **Done**. The Totals window is closed.

View sales totals

1. Select the Sales Totals tab. The totals for the sales for the item rows that you selected are displayed on the Totals window.
2. Click **Done**. The Totals window is closed.

View competitive analysis totals

1. Select the Competitive Analysis Totals tab. The totals for how you are competing in all retail zones that you have selected are displayed on the Totals window.
2. Click **Done**. The Totals window is closed.

Perform a what-if analysis

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

The screenshot shows the 'Worksheet Status' workspace. At the top, there are fields for 'Reason' and 'Action' with an 'Apply' button. Below this is a table with columns: Merchandise Level, Merchandise ID, Location Level, Location ID, Location, Status, Conflict, Last Review Date, Reason, Price Change Amount, Price Change SOH, and Price Change. The table contains 14 rows of data. At the bottom, there are summary statistics: Total Price Change Amount (\$720,353.40), Total Price Change SOH (9730), and Total Price Change Items (100). There are also buttons for 'Select All', 'Unselect All', and 'Worksheet Detail'.

Merchandise Level	Merchandise ID	Location Level	Location ID	Location	Status	Conflict	Last Review Date	Reason	Price Change Amount	Price Change SOH	Price Change
Subclass	1 Storm	Store	1000000...	Minnea...	New		11-24-2004		\$0.00	0	12
Class	2 Corin's Class 2	Zone	401	Mpls a...	New		11-24-2004		\$0.00	0	1
Department	13 SLH Test Dep...	Zone	10	Land O...	New		11-24-2004		\$0.00	0	0
Subclass	1 Storm	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	12
Subclass	1 Puff	Store	1000000...	Fargo	New		11-24-2004		(\$83,894.00)	375	8
Department	1221 Kitchenware	Store	1000000...	Buffalo	New		11-24-2004		\$0.00	0	0
Subclass	1 Puff	Store	1000000...	Minnea...	New		11-24-2004		(\$291,175.00)	775	10
Department	1704 *Candidat...	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	29
Department	1221 Kitchenware	Zone	401	Mpls a...	New		11-29-2004		(\$345,284.40)	8580	6
Department	1704 *Candidat...	Store	1000000...	Houston	New		11-24-2004		\$0.00	0	22

Summary Statistics:

- Total Price Change Amount: (\$720,353.40)
- Total Price Change SOH: 9730
- Total Price Change Items: 100

Buttons: Select All, Unselect All, Worksheet Detail, Cancel, Done

Worksheet status workspace

1. Select the worksheet you want to view the details of. You can select multiple worksheets or click **Select All** to select all of the worksheets.
2. Click **Worksheet Detail**. The Worksheet Detail workspace is displayed.

Retek Price Management

Worksheet Details

Worksheet Details

ItemFirstView Save View Item Level Tran Level Diff Type

New Retail	Item ID	% off Regular Ret	% off Basis Retail	Base Cost	Basis Cost	Class Id	Class Description	Clearance Indicate	Clear
180.00	100140078	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140086	-10%	-10%	200.00	200.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140094	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140107	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140115	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140123	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140131	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140140	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140158	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140174	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140182	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140191	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	

Unselect All Select All Reset Data What If

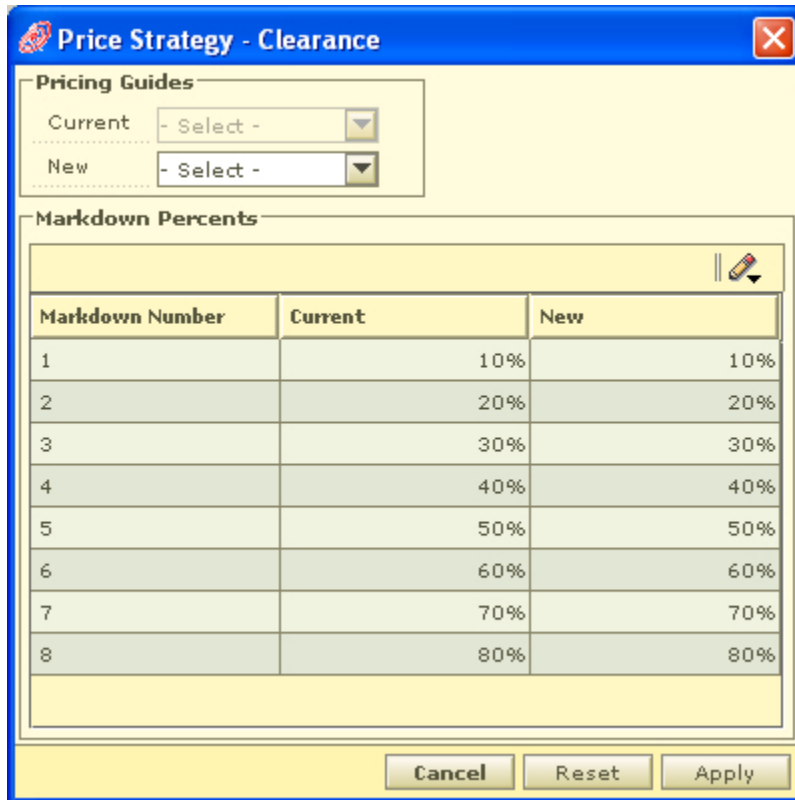
Retek Cancel Save Done

Worksheet detail workspace

- Select the row you want to perform a what-if analysis on by clicking the box ☐ to the left of the row. You can select multiple rows. Click **Select All** to select all the rows.

Perform a what-if analysis on a clearance pricing strategy

1. Click **What If**. The What If window is displayed.



The dialog box titled "Price Strategy - Clearance" contains two main sections. The "Pricing Guides" section at the top has two dropdown menus labeled "Current" and "New", both currently set to "- Select -". Below this is the "Markdown Percents" section, which contains a table with 8 rows. The table has three columns: "Markdown Number", "Current", and "New". The "Current" column shows percentages from 10% to 80% in 10% increments. The "New" column also shows percentages from 10% to 80% in 10% increments. At the bottom of the dialog are three buttons: "Cancel", "Reset", and "Apply".

Markdown Number	Current	New
1	10%	10%
2	20%	20%
3	30%	30%
4	40%	40%
5	50%	50%
6	60%	60%
7	70%	70%
8	80%	80%

What If window

2. Make changes to the following fields to test what happens to the worksheet:
 - Price guide - select a new price guide from the New drop-down.
 - Markdown percent - enter a markdown percent in the New Markdown Percent field.
3. Click **Apply**. The What If window is closed and the data in the Worksheet change to reflect the changes made in the What If window.

Perform a what-if analysis on a competitive pricing strategy

1. Click **What If**. The What If window is displayed.

Price Strategy - Competitive

Pricing Guides

Current: - Select -
New: - Select -

Competitor Parameters

Current Compete Type: Price By Code * New Compete Type: Price By Code
Current Compete Percent: New Compete Percent:
Current Acceptable Range From: Current Acceptable Range To:

Compete Values by Code

Code	Current Compete Ty	Current Compete Perce	Current Acceptable Range F	Current Acceptable Range	New Compete Ty	New Compete Perce
No Code	Price Below	15%	15%	20%	Price Below	15%
Alpha1	Price Above	10%			Price Above	10%
Christm...	Price Above	7%	5%	8%	Price Above	7%
Seasonal	Match				Match	

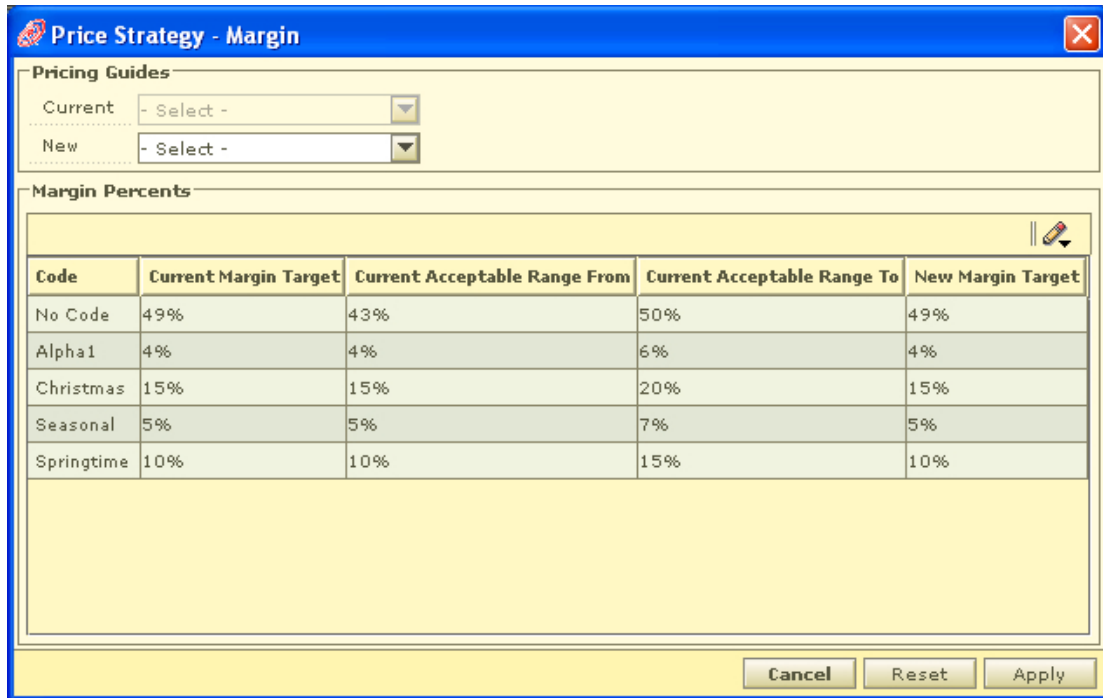
Cancel Reset Apply

What If window

2. Make changes to the following fields to test what happens to the worksheet:
 - Price guide - select a new price guide from the New drop-down.
 - Compete type - select a different compete type for the whole worksheet or by code by selecting from the New Compete Type drop-downs.
 - Compete percent - enter a new compete percent in the New Compete Percent field.
3. Click **Apply**. The What If window is closed and the data in the Worksheet change to reflect the changes made in the What If window.

Perform a what-if analysis on a margin pricing strategy

1. Click **What If**. The What If window is displayed.



The dialog box titled "Price Strategy - Margin" contains two sections: "Pricing Guides" and "Margin Percents".

Pricing Guides

Current: - Select -
 New: - Select -

Margin Percents

Code	Current Margin Target	Current Acceptable Range From	Current Acceptable Range To	New Margin Target
No Code	49%	43%	50%	49%
Alpha1	4%	4%	6%	4%
Christmas	15%	15%	20%	15%
Seasonal	5%	5%	7%	5%
Springtime	10%	10%	15%	10%

Buttons: Cancel, Reset, Apply

What If window

2. Make changes to the following fields to test what happens to the worksheet:
 - Price guide - select a new price guide from the New drop-down.
 - Margin target - enter a margin target in the New Margin Target field.
3. Click **Apply**. The What If window is closed and the data in the Worksheet change to reflect the changes made in the What If window.

Reset the what-if data

1. Click **What If**. The What If window is displayed.
2. Click **Reset**. The values are returned to their original value.
3. Click **Apply**. The What if window is closed and the data in the Worksheet change back to their original value.

Export a worksheet

Export allows you to export the current view of the worksheet to a Comma Separated Value (csv) file.

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

The screenshot shows the 'Worksheet Status' workspace. At the top, there are fields for 'Reason' and 'Action' with an 'Apply' button. Below this is a table with columns: Merchandise Level, Merchandise ID, Location Level, Location ID, Location, Status, Conflict, Last Review Date, Reason, Price Change Amount, Price Change SOH, and Price Change. The table contains 12 rows of data. At the bottom, there are summary statistics: Total Price Change Amount (\$720,353.40), Total Price Change SOH (9730), and Total Price Change Items (100). There are also buttons for 'Select All', 'Unselect All', and 'Worksheet Detail'.

Merchandise Level	Merchandise ID	Location Level	Location ID	Location	Status	Conflict	Last Review Date	Reason	Price Change Amount	Price Change SOH	Price Change
Subclass	1 Storm	Store	1000000...	Minnea...	New		11-24-2004		\$0.00	0	12
Class	2 Corin's Class 2	Zone	401	Mpls a...	New		11-24-2004		\$0.00	0	1
Department	13 SLH Test Dep...	Zone	10	Land O...	New		11-24-2004		\$0.00	0	0
Subclass	1 Storm	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	12
Subclass	1 Puff	Store	1000000...	Fargo	New		11-24-2004		(\$83,894.00)	375	8
Department	1221 Kitchenware	Store	1000000...	Buffalo	New		11-24-2004		\$0.00	0	0
Subclass	1 Puff	Store	1000000...	Minnea...	New		11-24-2004		(\$291,175.00)	775	10
Department	1704 *Candidat...	Store	1000000...	Fargo	New		11-24-2004		\$0.00	0	29
Department	1221 Kitchenware	Zone	401	Mpls a...	New		11-29-2004		(\$345,284.40)	8580	6
Department	1704 *Candidat...	Store	1000000...	Houston	New		11-24-2004		\$0.00	0	22

Summary Statistics:

- Total Price Change Amount: (\$720,353.40)
- Total Price Change SOH: 9730
- Total Price Change Items: 100

Worksheet status workspace

1. Select the worksheet you want to view the details of. You can select multiple worksheets or click **Select All** to select of all the worksheets.
2. Click **Worksheet Detail**. The Worksheet Detail workspace is displayed.

Worksheet Details

Worksheet Details

ItemFirstView

Save View

Item Level

Tran Level

Diff Type

New Retail	Item ID	% off Regular Ret	% off Basis Retail	Base Cost	Basis Cost	Class Id	Class Description	Clearance Indicator	Clear
Filter by:	Filter by:	Filter by:	Filter by:	Filter by:	Filter by:	Filter by:	Filter by:	Filter by:	Filter
180.00	100140078	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140086	-10%	-10%	200.00	200.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140094	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140107	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140115	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140123	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140131	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140140	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140158	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140174	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140182	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	
180.00	100140191	-10%	-10%	100.00	100.00	2	Nimbus	<input checked="" type="checkbox"/>	

Unselect All

Select All

Reset Data

What If



Retek

Cancel

Save

Done

Worksheet detail workspace

3. Select the row you want to export by clicking the box  to the left of the row. You can select multiple rows. Click **Select All** to select all the rows.
4. Click the Export  button. The Save window is displayed.

Save

Save In:

Temp

WERC.tmp.dir00

WERD.tmp.dir00

WERE.tmp.dir00

WERF.tmp.dir00

WERF.tmp.dir01

Word8.0

{00761b06-803d-11d4-9790-00c04f8eeb39}

{46891FF9-F43A-4AE6-B3F2-5C3FD4CC4B81}

{a5ba14e0-7384-11d4-bae7-00409631a2c8}

{a8833100-1481-11d4-9731-00c04f8eeb39}

{abda9912-5d00-11d4-bae7-9367ca097955}

{CA532E73-1BB7-11D8-9D6A-00010240CE95}

{CE303AFF-1BBB-11D8-9D6A-00010240CE95}

PricingWorksheet44544

File Name:

PricingWorksheet44544.csv

Files of Type:

*.csv

Save

Cancel

Save window

5. Select a location to save the file to from the Save In drop-down.
6. Enter a name for the file in the File Name field.
7. Click **Save**. The file is saved.
8. Open the file in the program of your choice such as a spreadsheet or word processor.

Apply filters

Since worksheets may contain many detail records, RPM gives you the ability to filter those records so you see only the details that need attention. You can perform an ad hoc filter on any column in the Worksheet Detail or you can create and save an advanced filter that you can continue to use in the future.

Apply an ad hoc filter

- In the Worksheet Details pane, select a value from the Filter by: drop-down above the column you wish to filter the worksheet by. The worksheet refreshes, with the filter applied.

Clear an ad hoc filter

- In the Worksheet Details pane, select Clear Filter from the Filter by: drop-down above the column that the filter was applied to. The filter is cleared and the worksheet returns to its previous state.



Note: Any other filters applied will still be applied to the worksheet.

Clear all filters

- In the Worksheet Details pane, select Revert to Default from the Filter by: drop-down above any column. The filters are cleared and the worksheet returns to its original state.

Apply an advanced filter



Note: Advanced filters override any ad hoc filters previously applied to the worksheet.

1. In the Worksheet Details pane, select Advanced Filter from the Filter by: drop-down above the column you wish to filter the worksheet by. The Advanced Filter dialog is displayed.

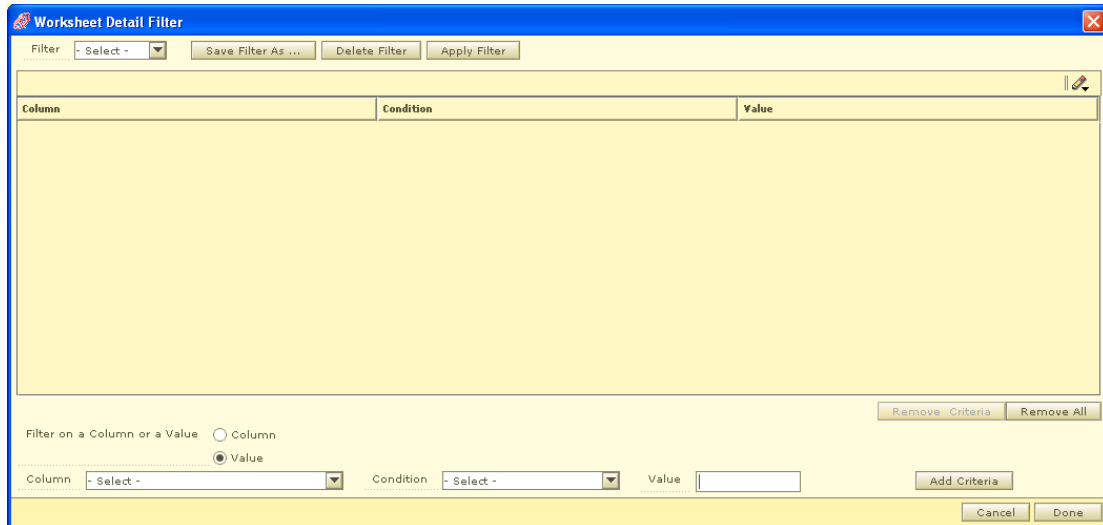
Advance filter dialog

2. Select a condition to apply to the column from the top drop-down in the dialog.
3. Enter or select a value for the filter to look for in the next drop-down.
4. You may enter an additional condition and value in the remaining drop-downs.

5. Select a logical operator (And or Or) in the area between the drop-downs.
6. Click **OK** to apply the filter to the worksheet. The worksheet refreshes, with the filter applied.


Maintain worksheet detail filters

- In the Worksheet Details pane, click the Filter  button. The Worksheet Detail Filter window is displayed.



Worksheet detail filter window



Note: Click the  clear filter button to remove the filter criteria.

Create a worksheet detail filter

1. Select Column to have the filter compare the values in two columns.
Or
Select Value to have the filter match a value in a column.
2. Select a column to filter by from the Column drop-down.
3. Select a condition to apply to the filter from the Condition drop-down.
4. Select a column to compare to the previous column in the Column drop-down if you chose to filter by column above.
Or
Select of Enter a value for the filter to look for in the next field if you chose to filter by value above.
5. Click **Add Criteria**. The criteria is added to the Worksheet Detail Filter table.
6. Repeat the steps above to continue adding criteria. Continue to the next step.
7. Click **Save As** to save the filter.
 - Enter a name for the filter in the Save Filter dialog.

Apply a worksheet detail filter

1. Select a filter from the Filter drop-down.
2. Select criteria from the Worksheet Detail Filter table. You can select multiple criteria.
3. Click **Apply Filter**. The Worksheet Detail Filter window is closed and the filter is applied.

Delete worksheet detail filter criteria

1. Select a filter from the Filter drop-down .
2. Select criteria from the Worksheet Detail Filter table.
3. Click **Remove Criteria**. The criteria is removed from the filter. Click **Remove All**, to remove all criteria from the filter.


Delete a worksheet detail filter

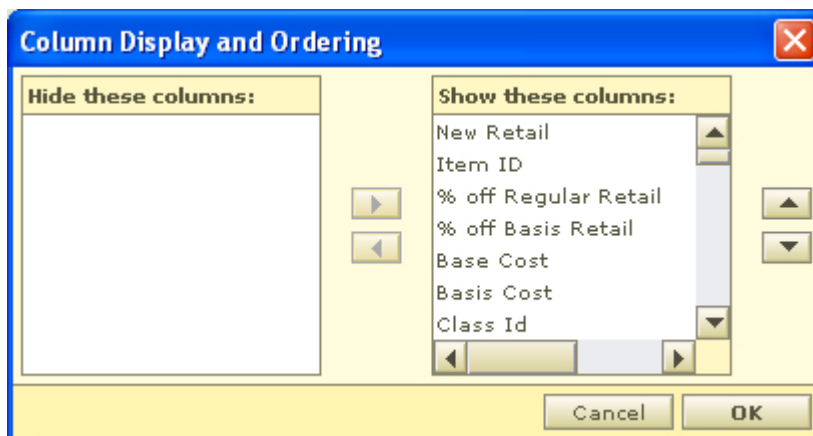
1. Select a filter from the Filter drop-down.
2. Click **Delete Filter**. The filter is removed from the Filter drop-down.

Change views


You can edit the worksheet to display only the columns you are concerned with, change the order the columns appear, and change the number of rows that are displayed.



Hide and position columns

1. In the Worksheet Details pane, click the  button.
2. Select Column Display and Ordering... from the drop-down menu. The Column Display and Ordering window is displayed.




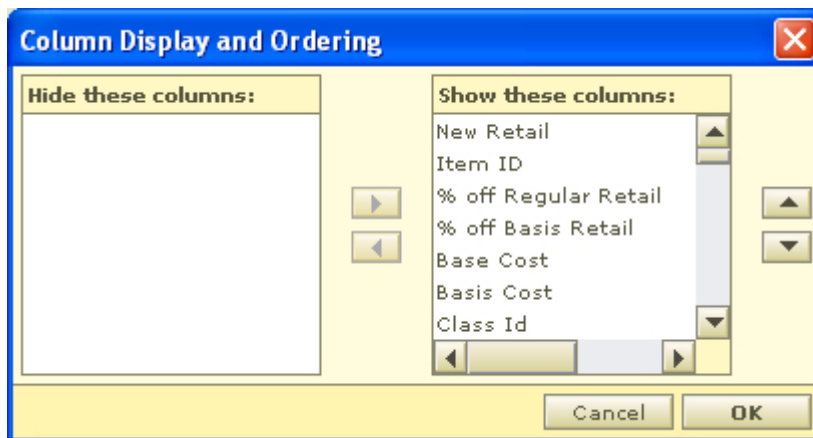
Column display and ordering window

3. To hide columns:
 - a. Select a column to hide in the Show these columns pane.
 - b. Click the  button. The column name appears in the Hide these columns pane.
 - c. Repeat the steps above to hide additional columns.
 - To hide individual columns, right-click on the column heading in the Worksheet Details pane and select Hide Column from the drop-down menu.




4. To position columns:
 - a. Select a column to re-position in the Show these columns pane.
 - b. Click the  and  buttons as necessary to move the columns. This determines the position of the columns from left to right.
 - c. Repeat the steps above to re-position additional columns.
 - To reposition individual columns, click on the column heading in the Worksheet Details pane and drag it to the desired position.
5. Click **OK**. The worksheet columns are repositioned to reflect your changes.

Sort the worksheet


1. In the Worksheet Details pane, click the  button.
2. Select Sort Table... from the drop-down menu. The Column Display and Ordering window is displayed.




Column display and ordering window

3. Set the sort order of the worksheet:
 - a. Select a column from the Columns pane.
 - b. Click the  button. The column name appears in the Priority Column pane.
 - c. Repeat the steps above to move additional columns.
 - d. Select a column in the Priority Column pane.
 - e. Click the  and  buttons as necessary to move the columns. This determines the order by which the worksheet information is sorted.
 - f. Deselect the Ascending column to have the column sort date in a descending manner.
 - g. Repeat the steps above as necessary.
4. Click **OK**. The worksheet columns are sorted to reflect your changes.
 - To sort based on individual columns, right-click on the column heading in the Worksheet Details pane and select either Make Primary Sort, Ascending or Make Primary Sort, Descending from the drop-down menu.

Adjust the size of the worksheet content


1. In the Worksheet Details pane, click the  button.
2. Move the cursor over Size Content.
3. Select from the drop-down menu:
 - Smallest
 - Smaller
 - Standard
 - Larger
 - Largest
 - Fit All
4. The size of the content on the worksheet is adjusted.

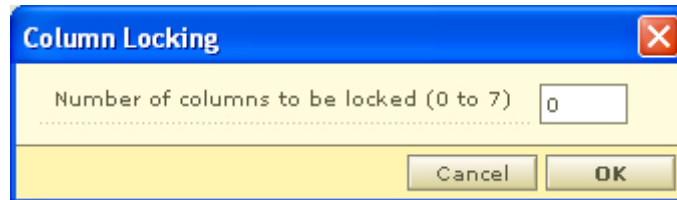
Adjust column sizes

1. In the Worksheet Details pane, click the  button.
2. Move the cursor over Column Resizing in the drop-down menu.
3. Select from the drop-down menu:
 - Adjust Next Column Only
 - Adjust Subsequent Columns
 - Adjust Last Column Only
 - Adjust All Columns
4. The worksheet columns are adjusted.
 - To resize individual columns, position the cursor on the right-hand border of the column heading. The cursor will change to a double arrow. Click and drag right or left to resize the column.

Set non-scrolling columns

You can set up to seven columns to be locked or non-scrolling. This allows comparison of values in the locked columns to all other columns in the worksheet.

1. In the Worksheet Details pane, click the  button.
2. Select Column Locking from the drop-down menu. The Column Locking dialog is displayed.

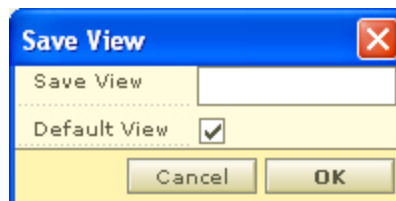


Column locking dialog

3. Enter the number of columns to lock.
4. Click **OK**. The columns are locked (non-scrolling).

Save a view

1. Click **Save View**. The Save View dialog is displayed.



Save view dialog

2. Enter a name for the view in the Save View field.
3. Select the Default View checkbox if you would like the view you created to be the default view.
4. Click **Save**. The view is saved and is accessible from the View drop-down at the top of the Worksheet Details pane.

Chapter 7 – Price changes

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-unit pricing across multiple currencies.

Create price change allows you to create the following types of price changes.

- **Regular:** The price change is occurring at the retailer's initiative.
- **Vendor Funded:** The supplier is subsidizing the price change.
- **Link codes:** Associate items to each other at a location and price them exactly the same.

Procedures

Create a regular price change

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

The screenshot shows the 'Create Price Change' workspace. It features a 'Price Change List' 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. Below the table is a 'Price Change Maintenance' section. This section includes fields for 'Type' (with radio buttons for Regular, Vendor Funded, and Link Code), 'Effective Date' (with a calendar icon), 'Price Change Type' (a dropdown menu), 'Change Amount', 'Selling UOM', 'Price Guide' (with a LOV button), 'Reason Code' (with a LOV button), 'Multi Unit Pricing' (a checkbox), 'Multi Units', 'Multi Unit Retail', and 'Multi Unit UOM'. There is also a 'Location Selection' section with fields for 'Zone Group', 'Zone', and 'Location', each with a LOV button. Below this is an 'Item Selection' section with fields for 'Department' and 'Class', each with a LOV button. At the bottom of the workspace are 'Cancel', 'Save + Repeat', and 'Done' buttons.

Create Price Change workspace




1. In the Price Change Maintenance pane, in the Type field, select Regular.
 2. In the Effective Date field, enter the date the price change is enabled, or click the calendar button and select a date.
- Note:** The Effective Date you can set depends on the number of days set in the system option Price Change Processing Days. The earliest date price changes can be created is today's date plus the price change processing days.
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 and locations that share the same currency as the currency on 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.

Select locations

1. 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.



Note: You can create price changes at the zone level. Locations are not required.


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

Setup price change type

1. 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 is changed by a percentage added to or removed from the basis regular retail. 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 basis regular retail. 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.
2. If appropriate, 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 Unit 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.
 3. In the Change Amount field, enter an amount.


Select items


1. In the Price Change Maintenance pane, in the Item Selection area, select items on the price change using the available fields.


Item Selection


Department  +


Class  +


Subclass  +

Item Type 

Item Level 


Diff Type 





Item  +

Diff  +

Item Selection			
Level	ID	Diff ID	Description



Note: All fields with LOV  + buttons allow multiple selections.

- To select items from all available items, enter an ID in the Item field, or click the LOV  + button and select item.
- Or
- a. Enter information in the enabled fields to limit the items available in the Item field.
 - In the Department field, enter a department number, or click the LOV  + button and select a department.
 - In the Class field, enter a class number, or click the LOV  + button and select a class.
 - In the Subclass field, enter a subclass number, or click the LOV  + button and select a subclass.
 - In the Item Type drop-down, select Item or Item List.




Note: If you select Item List from the Item Type drop-down, only item lists will be selectable from the Item field. If you select Item, only single items that conform to the other criteria specified will be selectable.

- In the Item Level drop-down, select Parent Item, Parent Item/Diff, or Transaction Level Item.



Note: The Diff Type and Diff fields are only enabled if Parent Item/Diff is selected.

- In the Diff Type drop-down, select a diff type.
 - In the Diff drop-down, select a diff.
- b. In the Item field, click the LOV  + button and select items.
2. Click **Select**. Items that meet your criteria are added to the Item Selection table.

Complete the price change

1. In the Price Change Maintenance pane, click **Apply** to add all your changes.
2. Change the status of your price change as appropriate.
3. Click **Done** to save your changes and close the workspace.

Create a vendor funded price change

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

The screenshot shows the 'Create Price Change' workspace. At the top is the 'Price Change List' pane, which contains 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. Below the table are buttons for Status, Action (a dropdown menu), and Update. A row of buttons includes Delete, New, Copy, Loc Exception, Tran Exception, Conflict Check, and Select All.

The main 'Price Change Maintenance' pane 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 currently showing '- Select -'.
- Change Amount:** A text input field.
- Selling UOM:** A text input field with a small icon to its right.
- Price Guide:** A text input field with a small icon to its right.
- * Reason Code:** A text input field with a small icon to its right.
- 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 small icon to its right.
- Location Selection:** A section with fields for Zone Group, Zone, and Location, each with a small icon to its right.
- Location Selection Table:** A table with columns: Level, ID, Description, and Location Type.
- Item Selection:** A section with fields for Department and Class, each with a small icon to its right.

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

Create Price Change workspace

1. In the Price Change Maintenance pane, in the Type field, select Vendor Funded. The Price Change Maintenance pane changes.


Price Change Maintenance			
Type	<input type="radio"/> Regular <input checked="" type="radio"/> Vendor Funded <input type="radio"/> Link Code	Price Guide	<input type="text"/>
* Effective Date	<input type="text"/>	* Reason Code	<input type="text"/>
* Price Change Type	- Select -	Multi Unit Pricing	<input type="checkbox"/>
Change Amount	<input type="text"/>	Multi Units	<input type="text"/>
Selling UOM	<input type="text"/>	Multi Unit Retail	<input type="text"/>
		Multi Unit UOM	<input type="text"/>
Partner Type	- Select -	Partner	<input type="text"/>
* Deal ID	<input type="text"/>	* Deal Detail ID	<input type="text"/>
* Funding Type	- Select -	* Funding Amount	<input type="text"/>
▼ Location Selection			
Location <input type="text"/>			
<input type="button" value="Clear"/> <input type="button" value="Delete"/> <input type="button" value="Select"/>			
Location Selection			
Level	ID	Description	Location Type
▼ Item Selection			
Item <input type="text"/>			
<input type="button" value="Clear"/> <input type="button" value="Delete"/> <input type="button" value="Select"/>			
Item Selection			
Level	ID	Diff ID	Description

Create a vendor funded 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.



Note: The Effective Date you can set depends on the number of days set in the system option Price Change Processing Days. The earliest date price changes can be created is today's date plus the price change processing days.




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.

Select the vendor and deal

1. In the Price Change Maintenance pane, in the Partner Type drop-down, select the partner type.
 - Manufacturer
 - Distributor
 - Wholesaler
 - Supplier
2. In the Partner field, enter the ID of the partner with the deal, or click the LOV  button and select a partner.
3. In the Deal ID field, enter the ID of the deal, or click the LOV  button and select a deal.
4. In the Deal Detail ID field, enter the ID of the deal details, or click the LOV  button and select the deal details.

Select locations

1. In the location area of the Price Change Maintenance pane, in the Location field, enter a location ID, or click the LOV  button and select locations.



Note: Only locations on the deal are selectable.

2. Click **Select**. Locations are added to the table in the Location Selection table.


Setup price change type

1. 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 basis regular retail. 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 basis regular retail. 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.

2. If appropriate, 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 Unit 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.
3. In the Change Amount field, enter an amount.

Enter funding information


1. In the Price Change Maintenance pane, in the Funding Type drop-down, select Percent or Amount.



Note: If the selected locations have different currencies, only Percent is available.

2. In the Funding Amount field, enter an amount.

Select items

1. In the Item Selection area of the Price Change Maintenance pane, in the Item field, enter an item ID, or click the LOV  button and select items.



Note: Only items on the deal are selectable.

2. Click **Select**. The items appear in the Item Selection table.

Complete the price change

1. In the Price Change Maintenance pane, click **Apply** to add all your changes.
2. Change the status of your price change as appropriate.
3. Click **Done** to save your changes and close the workspace.

Create a link code price change

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

Create Price Change workspace

1. In the Price Change Maintenance pane, in the Type field, select Link Code.
2. In the Effective Date field, enter the date the price change is enabled, or click the calendar button and select a date.



Note: The Effective Date you can set depends on the number of days set in the system option Price Change Processing Days. The earliest date price changes can be created is today's date plus the price change processing days.






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 and locations that share the same currency as the currency on 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.

Select link codes

1. In the Link Code area of the Price Change Maintenance pane, in the Link Code field, enter the ID of the link code, or click the LOV  button and select a link code.
2. In the Currency field, enter the currency code, or click the LOV  button and select the currency.
3. In the Zone Group field, 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.
4. In the Zone field, 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.
5. In the Location field, enter the ID of the location that you want to add to the price change, or click the LOV + button and select a location.




Note: You can create price changes at the zone level. Locations are not required.

Setup price change type

1. In the Price Change Type field, select the type of price change that is occurring.



Note: Link code price changes can only be setup as fixed price.

- **Fixed Price:** The price for the item will be at a specified retail that will be defined in the change amount field.
2. If appropriate, 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 Unit 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.
 3. In the Change Amount field, enter an amount.

Complete the price change

1. In the Price Change Maintenance pane, click **Apply** to add all your changes.
2. Change the status of your price change as appropriate.
3. 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 displays the 'Maintain Price Changes' workspace. At the top, there is a 'Price change Search' section with various input fields and buttons. The fields are organized into two columns. The left column includes: Type (dropdown menu set to 'Regular'), Effective Date (calendar icon), To (calendar icon), Approved By (text field), Approved Date (calendar icon), To (calendar icon), Reason Code (text field with a plus icon), Deal ID (text field with a plus icon), Deal Detail ID (text field with a plus icon), Department (text field with a plus icon), Class (text field with a plus icon), Subclass (text field with a plus icon), Item Type (dropdown menu set to 'Item'), Item Level (dropdown menu set to 'Transaction Level Item' with a checkbox for 'Search On This Level Only'), Diff Type (dropdown menu set to '- Select -'), Item (text field with a plus icon), and Diff (text field with a plus icon). The right column includes: Status (dropdown menu set to '- Select -'), Created By (text field), Create Date (calendar icon), To (calendar icon), Price Guide (text field with a plus icon), Zone Group (text field with a plus icon), Zone (text field with a plus icon), Location (text field with a plus icon), a checkbox for 'Search On This Level Only', Market Basket Code (text field with a plus icon), and Link Code (text field with a plus icon). At the bottom right of the search section are 'Clear' and 'Search' buttons. The bottom of the workspace features the Retek logo on the left and a 'Cancel' button on the right.

Maintain Price Changes workspace

1. Enter criteria as necessary to restrict the search to the price changes you want to maintain.
2. Click **Search**. Your results are displayed in the Price Change List pane.

Price Change List

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		

Status: Executed Action: - Select - Update

Delete New Copy Loc Exception Tran Exception Conflict Check Select All

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

Price Change Search

Type: Regular

Effective Date: [] To: [] Status: - Select -

Approved By: [] Created By: []

Approved Date: [] To: [] Create Date: [] To: []

Reason Code: [] Price Guide: []

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: []

Zone Group: []

Zone: []

Location: [] ☐ Search On This Level Only

Market Basket Code: []

Link Code: []

Clear Search

Retek Cancel

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.

Price Change List

ID	Link Code	Item	Diff ID	Currency	Item Description	Item Level	Diff ID	Location	Location Desc	Location Type	Primary Zone
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 maintain. 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 Coding the Imp...

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

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 price change.

5. Click **Apply** to add all any changes.
6. 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 workspace

1. Search for and retrieve the price change you want to copy. 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

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

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.



Note: Effective dates and exceptions are not copied when copying a price change.

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. At the top is a 'Price change Search' section with various filters. The filters include: Type (Regular), Effective Date (calendar icon), To (calendar icon), Status (- Select -), Approved By, Created By, Approved Date (calendar icon), To (calendar icon), Create Date (calendar icon), To (calendar icon), Reason Code, Price Guide, Deal ID, Deal Detail ID, Department, Zone Group, Class, Zone, Subclass, Location, Item Type (Item), Item Level (Transaction Level Item), Search On This Level Only, Diff Type (- Select -), Item, Diff, Market Basket Code, and Link Code. At the bottom right of the search section are 'Clear' and 'Search' buttons. The Retek logo is visible at the bottom left of the workspace.

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. It contains a table with the following data:

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		

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

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.



Note: Only price changes with a status of Worksheet can be deleted.

Check for conflicting price changes

⇒ **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, Approved Date, 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 also checkboxes for 'Search On This Level Only' and 'Search On This Level Only'. The form has 'Clear', 'Search', and 'Cancel' buttons at the bottom.

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.

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. The table contains two rows of data.

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		

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

Price Change List pane

2. From the list of results, select the price change you want to check.
3. Click **Conflict Check**. If conflicts exist, the Conflict Review List window is displayed.

Conflict Review List

Conflict Review List

ID	Promotion Component	Item	Location	Change Type	Change Amount	Effective Date
3428		100098025	1000000013	Change By Percent	15%	12-20-2004

An approved price change for this item/location/date already exists.

Price Change Type	ID	Promotion Component	Date	Unit Retail on E	Selling UOM	Multi Units	Multi-Unit Retail	Multi-Unit Selling
Price Change	3221		12-04-2004	\$26.84	EACH			
Price Change	3075		12-20-2004	\$33.55	EACH			
Price Change	3243		12-01-2005	\$35.22	EACH			

Close

Conflict review list window

- 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.

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 also checkboxes for 'Search On This Level Only' and buttons for 'Clear', 'Search', and '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.

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 are buttons for 'Delete', 'New', 'Copy', 'Loc Exception', 'Tran Exception', 'Conflict Check', and 'Select All'.

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



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

2. From the list of results, select the price change.
3. 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 Coding the Imp...

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 zone on the price change, or click the LOV  button and select a location in the zone.
- 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.

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, Approved Date, 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 also checkboxes for 'Search On This Level Only' and 'Search On This Level Only'. The form has a 'Clear' button and a 'Search' button at the bottom right.

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.

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. The table contains two rows of data.

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		

Below the table, there is a status bar with 'Status: Executed' and 'Action: - Select -'. There are also buttons for 'Delete', 'New', 'Copy', 'Loc Exception', 'Tran Exception', 'Conflict Check', and 'Select All'.

Price Change List pane



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

2. From the list of results, select the price change.
3. 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 Coding the Imp...

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 parent item on the price change, or click the LOV  button and select an item.
- 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.

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.

The screenshot shows the 'Maintain Price Changes' workspace. At the top is a 'Price Change Search' section with various filters. The filters are organized into two columns. The left column includes: Type (dropdown set to 'Regular'), Effective Date (calendar icon), To (calendar icon), Approved By (text field), Approved Date (calendar icon), To (calendar icon), Reason Code (text field with a plus icon), Deal ID (text field with a plus icon), Deal Detail ID (text field with a plus icon), Department (text field with a plus icon), Class (text field with a plus icon), Subclass (text field with a plus icon), Item Type (dropdown set to 'Item'), Item Level (dropdown set to 'Transaction Level Item' with a checkbox for 'Search On This Level Only'), Diff Type (dropdown set to '- Select -'), Item (text field with a plus icon), and Diff (text field with a plus icon). The right column includes: Status (dropdown set to '- Select -'), Created By (text field), Create Date (calendar icon), To (calendar icon), Price Guide (text field with a plus icon), Zone Group (text field with a plus icon), Zone (text field with a plus icon), Location (text field with a plus icon), a checkbox for 'Search On This Level Only', Market Basket Code (text field with a plus icon), and Link Code (text field with a plus icon). At the bottom right of the search section 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 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.

The screenshot shows the 'Price Change List' pane. It contains a table with the following columns: ID, Link Code, Item, Diff ID, Descr, Currency, Item Description, Item Level, Diff ID, Location, Location Desc, Location Type, Primary Zone, and E. The table has two rows of data. Below the table is a status bar with a 'Status' dropdown set to 'Executed', an 'Action' dropdown set to '- Select -', and an 'Update' button. At the bottom are several buttons: 'Delete', 'New', 'Copy', 'Loc Exception', 'Tran Exception', 'Conflict Check', and 'Select All'.

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.

Conflict Review List

Conflict Review List

ID	Promotion Component	Item	Location	Change Type	Change Amount	Effective Date
3428		100098025	1000000013	Change By Percent	15%	12-20-2004

No approved price change for this item/location (data already exists).

Price Change Type	ID	Promotion Comp	Date	Unit Retail on E	Selling UOM	Multi Units	Multi-Unit Retail	Multi-Unit Selling
Price Change	3221		12-04-2004	\$26.84	EACH			
Price Change	3075		12-20-2004	\$33.55	EACH			
Price Change	3243		12-01-2005	\$35.22	EACH			

Close

Conflict review list window

- a. The current price change is displayed in the upper half of the window. Price changes, promotions, and/or clearances for the same item/location are displayed in the lower half of the window.
 - b. Click **Close** to close the Conflict Review List. 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.

Chapter 8 – Clearances

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. The following clearances can be created.


- **Regular:** The clearance is occurring at the retailer's initiative.
- **Vendor Funded:** The supplier is subsidizing the clearance.

Procedures

Create a regular clearance


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

Create Clearance workspace

1. In the Clearance Maintenance pane, in the Type field, select Regular.
2. In the Effective Date field, enter the date the clearance is enabled, or click the calendar  button and select a date.





Note: The Effective Date you can set depends on the number of days set in the system option Price Change Processing Days. The earliest date price changes can be created is today's date plus the price change processing days.

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 and locations that share the same currency as the currency on 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.

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.

Select locations

1. 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.
2. Click **Select**. Locations that meet your criteria are added to the table in the Location Selection area.

Setup clearance type

1. 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 basis retail 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 basis retail 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.

2. In the Change Amount field, enter the amount, percent, or fixed amount for the clearance.



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.

Select Items




1. In the Clearance Maintenance pane, in the Item Selection area, select items on the clearance using the available fields.



Note: All fields with LOV buttons allow multiple items to be selected.

- To select items from all available items, enter an ID in the Item field, or click the LOV button and select item.

Or

- a. Enter information in the enabled fields to limit the items available in the Item field.
 - In the Department field, enter a department number, or click the LOV  button and select a department.
 - In the Class field, enter a class number, or click the LOV  button and select a class.
 - In the Subclass field, enter a subclass number, or click the LOV  button and select a subclass.
 - In the Item Type drop-down, select Item or Item List.



Note: If you select Item List from the Item Type drop-down, only item lists will be selectable from the Item field. If you select Item, only single items that conform to the other criteria specified will be selectable.

- In the Item Level drop-down, select Parent Item, Parent Item/Diff, or Transaction Level Item.



Note: The Diff Type and Diff fields are only enabled if Parent Item/Diff is selected.

- In the Diff Type drop-down, select a diff type.
- In the Diff drop-down, select a diff.

- b. In the Item field, click the LOV  button and select items.

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

Complete the clearance

1. Click **Apply** to add any changes.
2. Change the status of your clearance as appropriate.
3. Click **Done** to save any changes and close the workspace.

Create a vendor funded clearance

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

The screenshot shows the 'Create Clearance' workspace. The top section, 'Clearance List', contains a table with 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. Below this is a 'Clearance Maintenance' section with the following fields: Type (radio buttons for Regular and Vendor Funded), Effective Date (calendar icon), Price Guide (text field with LOV icon), Reason Code (text field with LOV icon), * Price Change Type (dropdown), Change Amount (text field), Out Of Stock Date (calendar icon), Reset Date (calendar icon), Earliest Reset Date (text field), and Latest Reset Date (text field). The 'Location Selection' section includes Zone Group (text field with LOV icon), Zone (text field with LOV icon and plus button), and Location (text field with LOV icon and plus button). Below this is a 'Location Selection' table with columns: Level, ID, Description, and Location Type. The 'Item Selection' section at the bottom includes Department (text field with LOV icon and plus button) and Class (text field with LOV icon and plus button). Buttons for 'Delete', 'New', 'Copy', 'Loc Exception', 'Tran Exception', 'Conflict Check', and 'Select All' are located between the Clearance List and Clearance Maintenance sections. At the bottom right are 'Cancel', 'Save + Repeat', and 'Done' buttons.

Create Clearance workspace

1. In the Clearance Maintenance pane, in the Type field, select Vendor Funded.
2. In the Effective Date field, enter the date the clearance is enabled, or click the calendar button and select a date.





Note: The Effective Date you can set depends on the number of days set in the system option Price Change Processing Days. The earliest date price changes can be created is today's date plus the price change processing days.

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 and locations that share the same currency as the currency on 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.

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.

Select the vendor and deal

1. In the Clearance Maintenance pane, in the Partner Type drop-down, select the partner type.
 - Manufacturer
 - Distributor
 - Wholesaler
 - Supplier
2. In the Partner field, enter the ID of the partner with the deal, or click the LOV  button and select a partner.
3. In the Deal ID field, enter the ID of the deal, or click the LOV  button and select a deal.
4. In the Deal Detail ID field, enter the ID of the deal details, or click the LOV  button and select the deal details.

Select locations

1. In the location area of the Clearance Maintenance pane, in the Location field, enter a location ID, or click the LOV + button and select locations.



Note: Only locations on the deal are selectable.

2. Click **Select**. Locations are added to the table in the Location Selection table.

Enter funding information


1. In the Clearance Maintenance pane, in the Funding Type drop-down, select Percent or Amount.



Note: If the selected locations have different currencies, only Percent is available.

2. In the Funding Amount field, enter an amount.

Select items

1. In the Item Selection area of the Clearance Maintenance pane, in the Item field, enter an item ID, or click the LOV + button and select items.



Note: Only items on the deal are selectable.

2. Click **Select**. The items appear in the Item Selection table.

Complete the clearance

1. Click **Apply** to add any changes.
2. Change the status of your clearance as appropriate.
3. 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 columns of search criteria. The left column includes fields for Type (set to 'Regular'), Effective Date, Approved By, Approved Date, 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, Price Guide, Out Of Stock Date, Reset Date, Zone Group, Zone, Location, a checkbox for 'Search On This Level Only', and Market Basket Code. 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.
2. Click **Search**. Your results are displayed in the Clearance List pane.

Clearance List													
Clearance													
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

Status: Worksheet Action: - Select - Update

Delete New Copy Loc Exception Tran Exception Conflict Check Select All

Clearance List pane

Maintain 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			Status	- Select -							
Approved By														
Approved Date			To			Create Date			To					
Reason Code														
Deal ID														
Deal Detail ID														
Department														
Class														
Subclass														
Item Type	Item													
Item Level	Transaction Level Item <input type="checkbox"/> Search On This Level Only													
Diff Type	- Select -													
Item														
Diff														
Zone Group														
Zone														
Location														
<input type="checkbox"/> Search On This Level Only														
Market Basket Code														
<div>Clear Search</div>														

Retek

Cancel

Maintain Clearances workspace

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

Clearance List													
Clearance													
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

Status: Worksheet Action: - Select - Update

Delete New Copy Loc Exception Tran Exception Conflict Check 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

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

- 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 clearance.
- Click **Apply** to add all any changes.
- 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, Search On This Level Only, and Market Basket Code. 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 Status (Worksheet), Action (- Select -), Update, 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 copy.
3. Click **Copy**. The clearance details are displayed in 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 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

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

- 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 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, 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, and Market Basket Code. There are 'Clear' and 'Search' buttons at the bottom right of the form.

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' 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 Current Unit Price. 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, Location Description, Location Type, Primary Zone, Exception Ind, Parent ID, Current Unit, and Current Unit Price \$4.

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 Unit Price
697	1000	DOC Item 1	Transaction...	283	dv test 27								\$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 delete.
3. Click **Delete**. You are prompted to confirm your decision.
4. Click **Yes**. The clearance is deleted.
5. Click **Done** to close the window.



Note: Only clearances in Deleted status can be deleted.

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 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 maintain. Your results are displayed in the Clearance List pane.

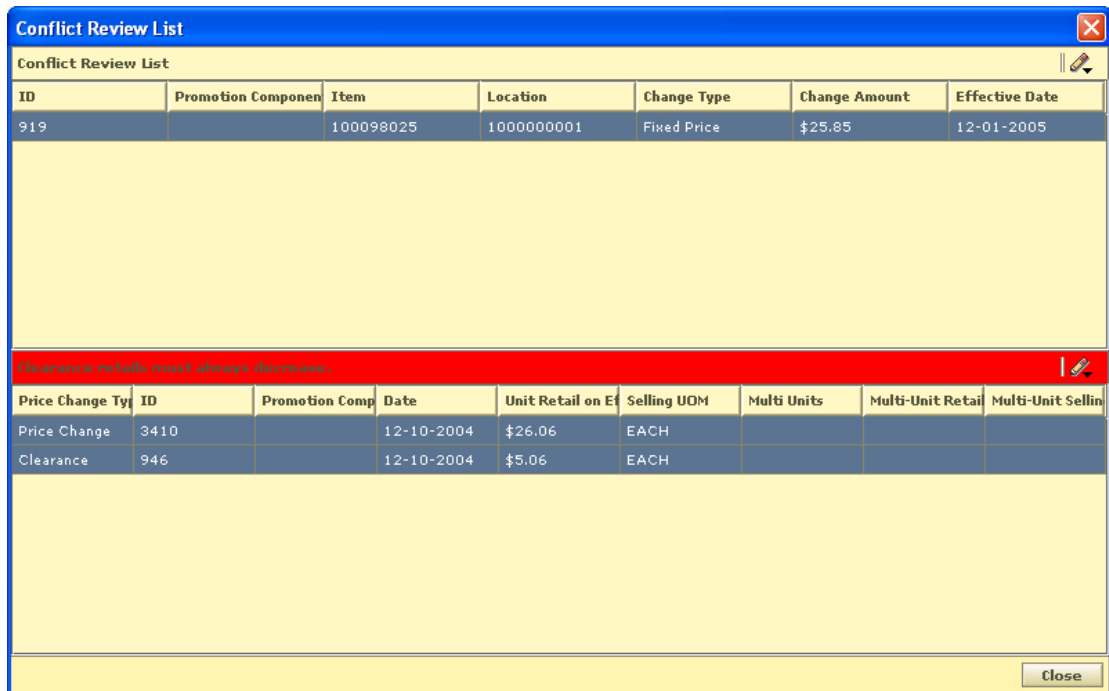
The screenshot shows the 'Clearance List' pane with a table of results. The table has columns: ID, Item, Item Description, Item Level, Diff ID, Diff ID Description, Location, Location Description, Location Type, Primary Zone, Exception Ind, Parent ID, Current Unit, and Currency. One row is visible with 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 'Status', 'Worksheet', 'Action' (- Select -), 'Update', '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 check.
3. Click **Conflict Check**. If conflicts exist, the Conflict Review List window is displayed.



The image shows a software window titled "Conflict Review List". It contains two tables. The first table has columns: ID, Promotion Component, Item, Location, Change Type, Change Amount, and Effective Date. It contains one row with ID 919, Item 100098025, Location 1000000001, Change Type Fixed Price, Change Amount \$25.85, and Effective Date 12-01-2005. Below this table is a large yellow rectangular area. A red banner with the text "Clearance retails must always decrease." is positioned below the yellow area. The second table has columns: Price Change Type, ID, Promotion Comp, Date, Unit Retail on E, Selling UOM, Multi Units, Multi-Unit Retail, and Multi-Unit Selling. It contains two rows: "Price Change" with ID 3410, Date 12-10-2004, Unit Retail on E \$26.06, and Selling UOM EACH; and "Clearance" with ID 946, Date 12-10-2004, Unit Retail on E \$5.06, and Selling UOM EACH. Below the second table is another large yellow rectangular area. A "Close" button is located at the bottom right of the window.

ID	Promotion Component	Item	Location	Change Type	Change Amount	Effective Date
919		100098025	1000000001	Fixed Price	\$25.85	12-01-2005

Clearance retails must always decrease.

Price Change Type	ID	Promotion Comp	Date	Unit Retail on E	Selling UOM	Multi Units	Multi-Unit Retail	Multi-Unit Selling
Price Change	3410		12-10-2004	\$26.06	EACH			
Clearance	946		12-10-2004	\$5.06	EACH			

Close

Conflict review list window

- If no conflicts exist, click **OK**.
 - If conflicts exist, you must adjust the details of your clearance before you can move the clearance 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.

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, 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 'Clear' and 'Search' buttons at the bottom right.

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.

The screenshot shows the 'Clearance List' pane with a table of clearance results. The table has 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. One 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 Current Price.

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

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



Note: Location exceptions can only be created for Zone Level clearances.

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

Clearance Maintenance			
Type	<input checked="" type="radio"/> Regular <input type="radio"/> Vendor Funded	Price Guide	
* Effective Date	10/01/2004	* Reason Code	5-2 Clearance Reas...
* Price Change Type	Change By Amount	Out Of Stock Date	
Change Amount	2.00	Reset Date	10/12/2004
		Earliest Reset Date	10-12-2004
		Latest Reset Date	10-12-2004


> Location Selection

Location Selection			
Level	ID	Description	Location Type
Zone	30	Z1-USD	

> Item Selection

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

Clearance Maintenance pane

4. In the Location field, enter the ID of the location where items are different than the zone on the clearance, 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 buttons for 'Clear', 'Search', and 'Cancel'.

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 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




Note: Item exceptions at the transaction level can occur only when the clearance was created at the item parent or item parent/diff level.

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

Clearance Maintenance															
Type	<input checked="" type="radio"/> Regular <input type="radio"/> Vendor Funded	Price Guide													
* Effective Date	10/01/2004	* Reason Code	5-2 Clearance Reas...												
* Price Change Type	Change By Amount	Out Of Stock Date													
Change Amount	2.00	Reset Date	10/12/2004												
		Earliest Reset Date	10-12-2004												
		Latest Reset Date	10-12-2004												
> Location Selection															
<div style="text-align: right;"> <input type="button" value="Clear"/> <input type="button" value="Delete"/> <input type="button" value="Select"/> </div> <table border="1"> <thead> <tr> <th colspan="4">Location Selection</th> </tr> <tr> <th>Level</th> <th>ID</th> <th>Description</th> <th>Location Type</th> </tr> </thead> <tbody> <tr> <td>Zone</td> <td>30</td> <td>Z1-USD</td> <td></td> </tr> </tbody> </table>				Location Selection				Level	ID	Description	Location Type	Zone	30	Z1-USD	
Location Selection															
Level	ID	Description	Location Type												
Zone	30	Z1-USD													
> Item Selection															
<div style="text-align: right;"> <input type="button" value="Clear"/> <input type="button" value="Delete"/> <input type="button" value="Select"/> </div> <table border="1"> <thead> <tr> <th colspan="4">Item Selection</th> </tr> <tr> <th>Level</th> <th>ID</th> <th>Diff ID</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Item</td> <td>12342</td> <td></td> <td>SH-Item for dev:32 Waist X32 Inseam</td> </tr> </tbody> </table>				Item Selection				Level	ID	Diff ID	Description	Item	12342		SH-Item for dev:32 Waist X32 Inseam
Item Selection															
Level	ID	Diff ID	Description												
Item	12342		SH-Item for dev:32 Waist X32 Inseam												

Clearance Maintenance pane

4. In the Item field, enter the ID of the item for which items are different than the parent item on the price change, or click the LOV  button and select an item.
5. In the enabled clearance fields, enter information about the clearance for the item/location.
6. Click **Apply** to add any changes.
7. Click **Done** to save any changes and close the window.

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.


The screenshot shows the 'Maintain Clearances' workspace. It features a 'Clearance Search' section with multiple input fields and dropdown menus. Fields include 'Type' (set to 'Regular'), 'Effective Date' (with a calendar icon), 'Approved By', 'Approved Date', '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', 'Diff', 'Status' (set to '- Select -'), 'Created By', 'Create Date', 'Price Guide', 'Out Of Stock Date', 'Reset Date', 'Zone Group', 'Zone', 'Location', and 'Market Basket Code'. There are also checkboxes for 'Search On This Level Only'. At the bottom right, there are 'Clear', 'Search', and 'Cancel' buttons.

Maintain Clearances workspace

1. 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. A single row is visible with the following data: 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, and Currency. 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

-  **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 clearance.
 4. Click **Update**. You are prompted to confirm your decision.
 5. Click **Yes**. If conflicts exist, the Conflict Review List window is displayed.

Conflict Review List

Conflict Review List

ID	Promotion Component	Item	Location	Change Type	Change Amount	Effective Date
919		100098025	1000000001	Fixed Price	\$25.85	12-01-2005

Clearance retails must always decrease.

Price Change Type	ID	Promotion Comp	Date	Unit Retail on E	Selling UOM	Multi Units	Multi-Unit Retail	Multi-Unit Selling
Price Change	3410		12-10-2004	\$26.06	EACH			
Clearance	946		12-10-2004	\$5.06	EACH			

Close

Conflict review list window

- a. The current clearance is displayed in the upper half of the window. Price changes, promotions, and clearances affecting the same item/location are displayed in the lower half of the window.
 - b. Click **Close** to close the conflict review list. The Maintain a clearance procedure contains additional information on how to adjust a clearance.
6. Click **Done** to save any changes and close the window.

Chapter 9 – 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

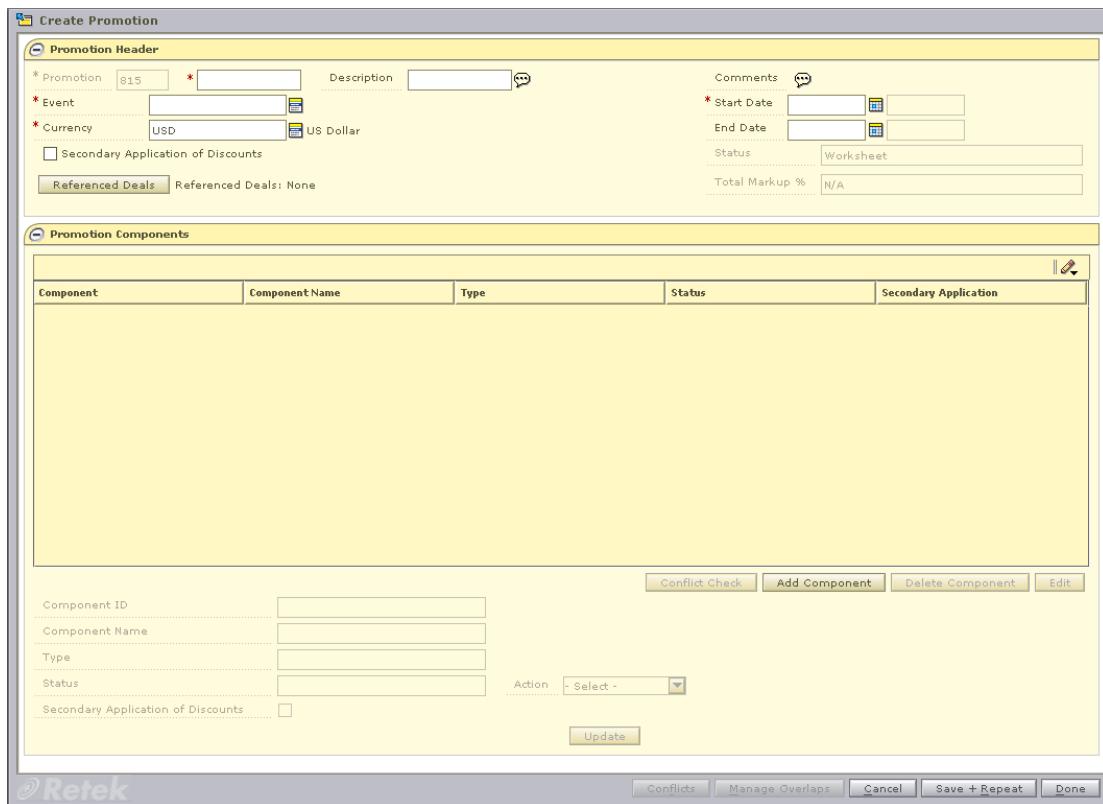
Maintain Promotion Events workspace

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. It features a 'Promotion Header' section with fields for Promotion ID (815), Description, Event, Currency (USD), Start Date, End Date, Status (Worksheet), and Total Markup % (N/A). Below this is the 'Promotion Components' section, which includes a table with columns: Component, Component Name, Type, Status, and Secondary Application. At the bottom, there are input fields for Component ID, Component Name, Type, Status, and a checkbox for 'Secondary Application of Discounts'. Action buttons include 'Conflict Check', 'Add Component', 'Delete Component', 'Edit', 'Update', '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 (List of Values) button.
- Currency:** A dropdown menu showing 'USD' and 'US Dollar'.
- Start Date:** A date field.
- End Date:** A date field.
- Status:** A dropdown menu showing 'Worksheet'.
- Total Markup %:** A text field showing 'N/A'.
- Secondary Application of Discounts:** A checkbox.
- Referenced Deals:** A button labeled 'Referenced Deals: None'.

 The bottom section, 'Promotion Components', features 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'.

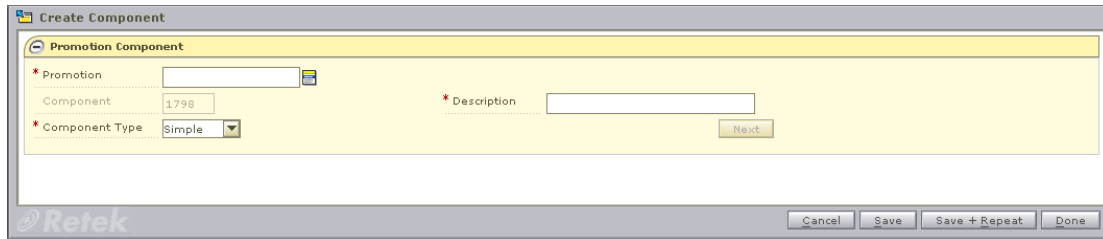
 At the bottom of the workspace, there are buttons for 'Conflict Check', 'Add Component', 'Delete Component', 'Edit', 'Update', 'Conflicts', 'Manage Overlaps', 'Cancel', 'Save + Repeat', and 'Done'. The Retek logo is visible in the bottom left corner.

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

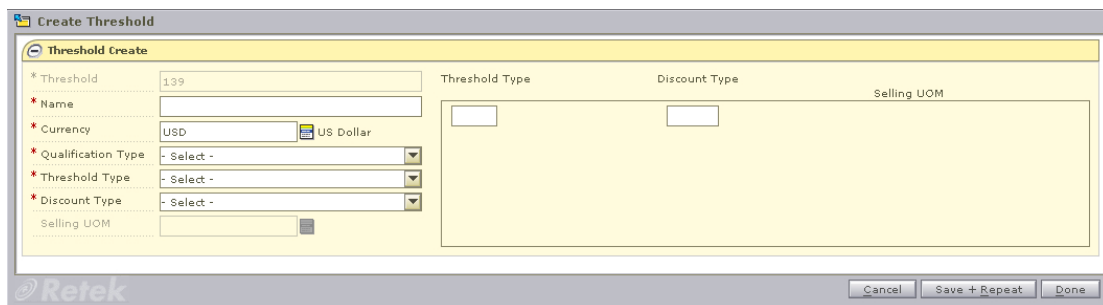
Overview

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.

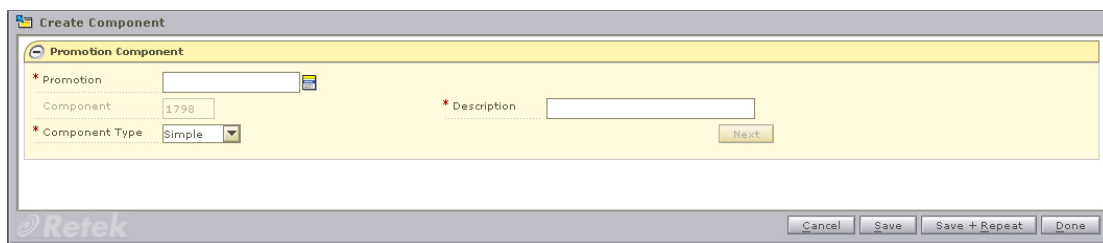
Procedures

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: 784 smm promo
 Component: 1800 Description: simple component
 Component Type: Simple

▼ Item Selection

Department: +
 Class: +
 Subclass: +
 Item Type: Item
 Item Level: Transaction Level Item
 Diff Type: - Select -
 Item: +
 Diff: +

Level	ID	Diff ID	Description
-------	----	---------	-------------

▼ Location Selection

Zone Group:
 Zone: +
 Location: +



Level	ID	Description	Location Type
-------	----	-------------	---------------

* Change Type: - Select -

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

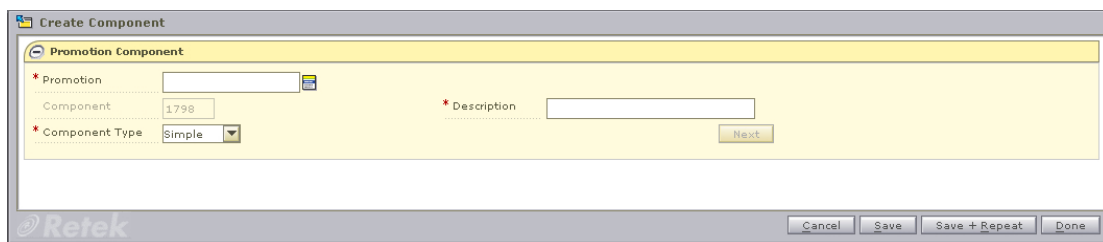
A threshold promotion component consists of an item, item group, or merchandise level that receives a discount at a location or group of locations when the customer purchases a quantity or a amount of an item. You must define the threshold levels before you can create the threshold component.

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  


► **Item Selection**   

Level	ID	Diff ID	Description


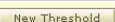
▼ **Location Selection**   


Zone Group: 


Zone:  +


Location:  +

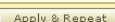


Level	ID	Description	Location Type

* 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.

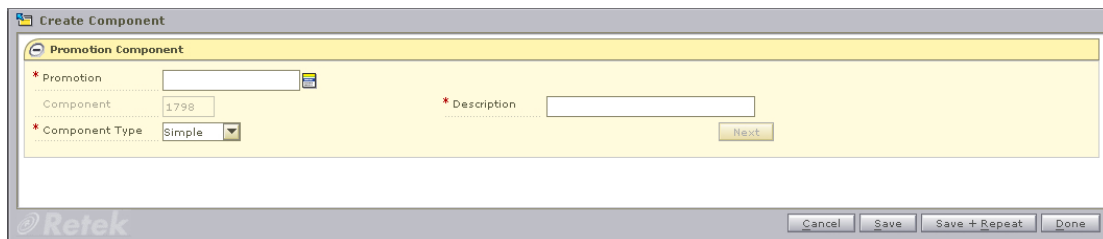
Procedures

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.

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	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. 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 'Create Promotion' workspace is divided into two main sections:

- Promotion Header:** This section contains fields for:
 - * Promotion: 815
 - * Event: [Empty]
 - * Currency: USD (US Dollar)
 - Secondary Application of Discounts: ☐
 - Referenced Deals: Referenced Deals: None
 - Comments: [Empty]
 - * Start Date: [Empty]
 - End Date: [Empty]
 - Status: Worksheet
 - Total Markup %: N/A
- Promotion Components:** This section contains a table with the following columns: Component, Component Name, Type, Status, and Secondary Application. Below the table are fields for:
 - Component ID: [Empty]
 - Component Name: [Empty]
 - Type: [Empty]
 - Status: [Empty]
 - Secondary Application of Discounts: ☐
 - Action: - Select -
 - Buttons: Conflict Check, Add Component, Delete Component, Edit, Update

The Retek logo is visible in the bottom left corner, and a row of buttons (Conflicts, Manage Overlaps, Cancel, Save + Repeat, Done) is at the bottom right.

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 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 showing 'None'. The bottom section, 'Promotion Components', 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 set to 'Select -' and an 'Update' button. At the bottom of the workspace, there are buttons for 'Conflict Check', 'Add Component', 'Delete Component', and 'Edit'. The Retek logo is visible in the bottom left corner, and a row of buttons (Conflicts, Manage Overlaps, Cancel, Save + Repeat, Done) is at the bottom right.

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 the frequency of deal reporting.
4. In the Bill Back Method field, select 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 Billing	Inc Deal Income in Stock Ledger
Supplier	Man 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	*Nomo 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.

The screenshot displays the 'Maintain Vendor Funding Defaults' workspace. At the top, there is a table with the following columns: Vendor Type, Vendor, Deal Reporting, Bill Back Method, Bill Back Period, Invoice Processing, Include VAT in Deal Billing, and Include Deal Income in Stock Ledger. The table contains three rows of data. The second row, for 'Test Supplier', is highlighted. Below the table, there is a form for editing the selected vendor's defaults. The form includes dropdown menus for Vendor Type (Supplier), Deal Reporting Level (Quarter), Bill Back Method (Debit Note), and Bill Back Period (Week). It also includes a text field for Vendor (1104), a dropdown for Invoice Processing Logic (Automatic), and checkboxes for Include VAT in Deal Billing and Include Deal Income in Stock Ledger. Buttons for Delete, Edit, Apply, Cancel, Save + Repeat, and Done are visible.

Vendor Type	Vendor	Deal Reporting	Bill Back Method	Bill Back Period	Invoice Processing	Include VAT in Deal Billing	Include Deal Income in Stock Ledger
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 **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

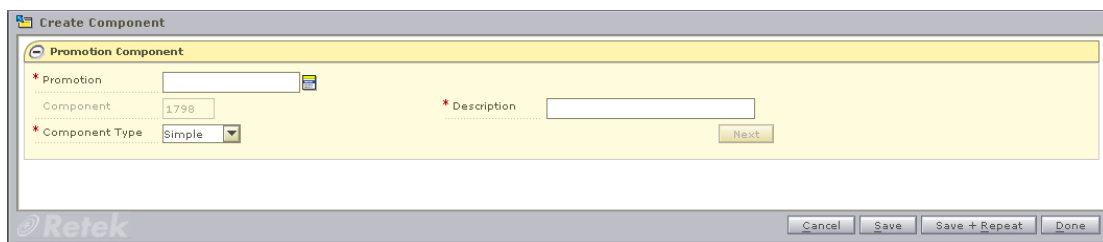
A threshold promotion component consists of an item, item group, or merchandise level that receives a discount at a location or group of locations when the customer purchases a quantity or a amount of an item. You must define the threshold levels before you can create the threshold component.

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: 1001 Description: smm


Component Type: Threshold  


► **Item Selection**   

Level	ID	Diff ID	Description


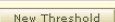
▼ **Location Selection**   


Zone Group: 


Zone:  +


Location:  +

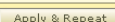


Level	ID	Description	Location Type

* 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

Item	Description

Get Items

Item	Description

Location Selection

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



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

▼ Threshold Uptake %

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

Threshold Uptake %

Create Deals ☒

Vendor Type

Vendor WISE POTATO ...

Deal ID

Deal Comp ID

Contribution %



Use Deal Locations ☐

Use Deal Items ☐

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"/>

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.

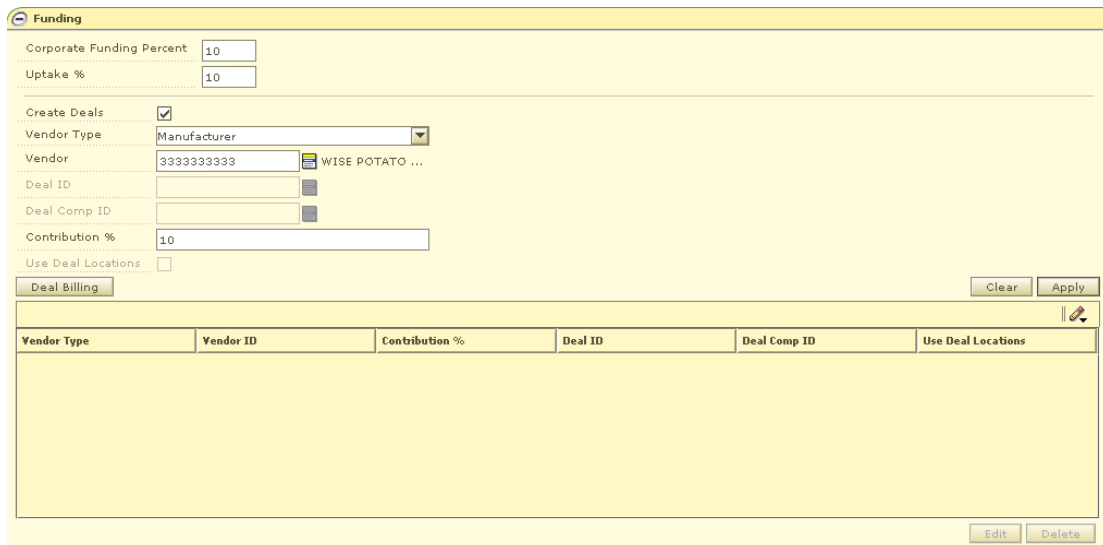


Note: The Use Deal Locations and Use Deal Items check boxes are disabled if the promotion component already has items or locations.

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.



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

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.



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

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 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' table with the following data:

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

Below the table are 'Delete' and 'Edit' buttons. At the bottom of the workspace is a 'Promotion Search Criteria' section with a 'Cancel' button.

Promotions Search workspace

1. Expand the Promotion Search Criteria pane.

The screenshot shows the 'Promotion Search Criteria' pane. It contains the following fields and sections:

- Promotion:** Text input field.
- Currency:** Text input field.
- Start Date: After:** Text input field with a calendar icon.
- End Date: After:** Text input field with a calendar icon.
- Item:** Text input field.
- Event:** Text input field.
- Status:** Text input field with a '+' icon.
- Before:** Text input field with a calendar icon.
- Before:** Text input field with a calendar icon.
- Location:** Section header.
- Advanced Search:** Section header.
- Buttons:** 'Refresh' and 'Search' buttons at the bottom right.

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 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
- 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]

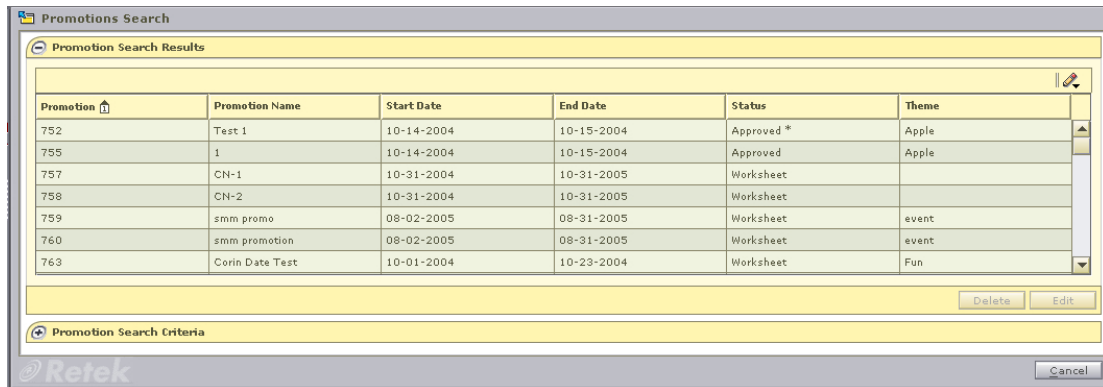
Bottom buttons: Conflicts, Manage Overlaps, Cancel, Done

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.

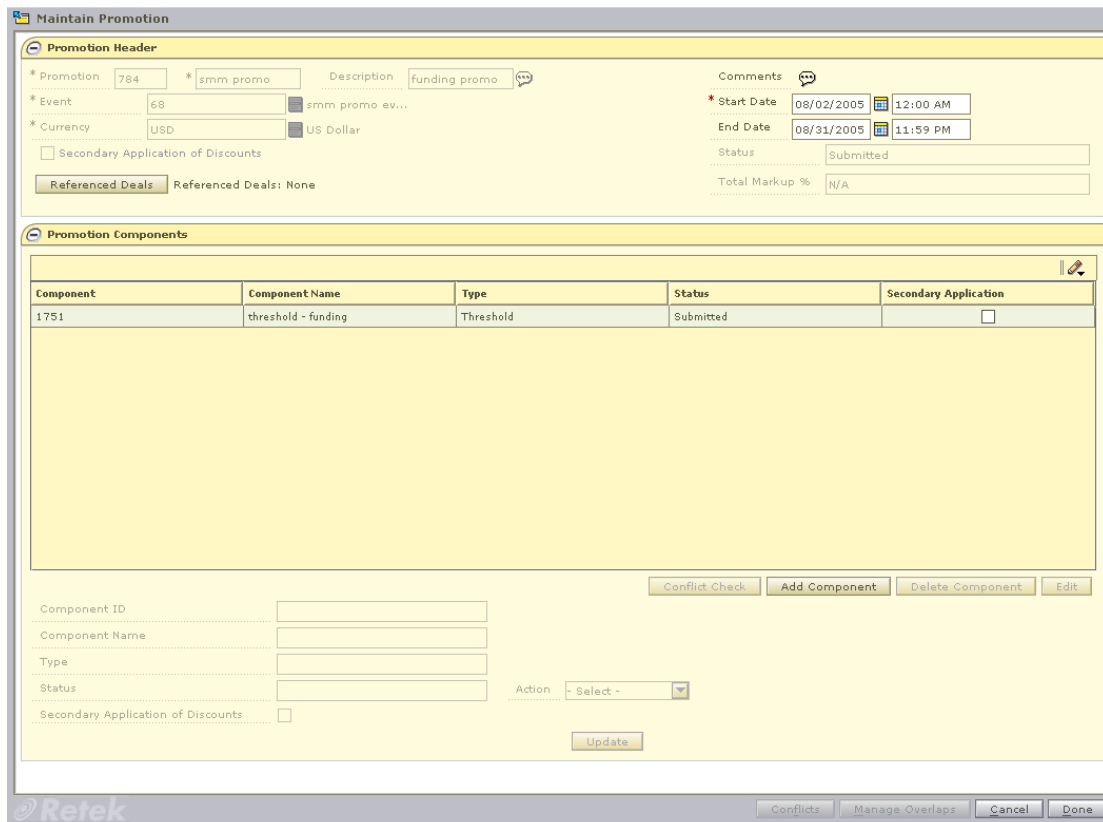


The screenshot shows the 'Promotions Search' workspace. It features a 'Promotion Search Results' pane with a table of results. Below the table are 'Delete' and 'Edit' buttons. At the bottom, there is a 'Promotion Search Criteria' section and a 'Cancel' button.

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
- Referenced Deals: Referenced Deals: None

Promotion Components:

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

At the bottom of the 'Promotion Components' section, there are fields for Component ID, Component Name, Type, Status, and Secondary Application of Discounts, along with an 'Update' button.

The bottom of the workspace includes buttons for 'Conflicts', 'Manage Overlaps', 'Cancel', and 'Done'.

Maintain Promotion workspace

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

Referenced Deals [X]

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	▼

▼ ▲

Linked Deals

Deal ID	Deal Type	Vendor Name	Status	Active Date	Close Date	Currency	
---------	-----------	-------------	--------	-------------	------------	----------	--

Cancel Select

Referenced Deals window

5. Select the deals you want to add to the promotion.
6. Click **Select**. The window closes.
7. 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.

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 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.

Glossary

# Days Rejects Held	The number of days after the effective date of a rejected price change or clearance that it is purged from the system.		
Allow Complex Promotions	When selected in system options, indicates that all promotion types are available.		
Apply Promo Change Type First	Allows you to indicate which type of promotion should be applied first.		
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.		
Candidate Rule	A set of criteria that is compared to each item to determine if the item meets one or more conditions. RPM uses two types of candidate rules, inclusion or exclusion		
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 items price and inventory value is returned to the regular price.		
Clearance/Promotions Overlap	When selected in system options, indicates that an item/location can be on clearance and promotion at the same time.		
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
Cost Calculation Method	The way that cost is determined for the zone. The cost is held at location so either the highest cost across the locations in the zone or the average (non-zero) cost should be used.		

# Days Rejects Held	The number of days after the effective date of a rejected price change or clearance that it is purged from the system.		
Currency	On System Defaults, the primary currency used in RPM. In other areas of RPM, the currency for a particular task		
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.		
Default Out of Stock Days	The number of days that should be added to an item's clearance effective date in order to calculate the Out of Stock date. The default is applied to generate the out of stock date when the clearance is first created.		
Default Reset Date	When selected in system options, indicates that a reset date should be defaulted when a clearance is created. The reset date is defaulted to one day greater than the out of stock date.		
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.		
End Date	The last day an element is effective in the system.		
Ends In Digits for Zero Decimal Currencies	The number of digit fields that are available in the Ends In definition area. This field is used for currencies that do not contain a place after the decimal point. For currencies that contain places after the decimal point, the digit fields that are available.		

# Days Rejects Held	The number of days after the effective date of a rejected price change or clearance that it is purged from the system.		
Event	The top level of a promotion, used to group several promotions together.		
Event ID Required	When selected in system options, a promotion event must be assigned to the promotion.		
Exact Deal / Funded Promotion Dates	When selected in system options, indicates that the dates of a deal associated with a vendor funded promotion must match exactly. When selected, only deals with the same begin and end dates as the promotion component being created will appear in the deal		
Exclusion Candidate Rule	When the exclusion rule is met, the item will not be brought in for review		
External Prices Allowed			
Inclusion Candidate Rule	When the inclusion rule is met, the item is flagged by the system for a pricing review		
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.		
Lead Item Calculation Type	Defines the method relationship pricing parameters as displayed on the pricing definition container.		
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.		
Location Move Lead Time	The number of days required before a location can be moved between zones in RPM.		
Location Move Purge Days			

# Days Rejects Held	The number of days after the effective date of a rejected price change or clearance that it is purged from the system.		
Location Price Exception	When selected in system options, exceptions should populate the Zone Location Retail Exception container for items where the current retail at a given location is not equal to the current retail for the zone.		
Markup	An amount added to the cost price to determine the selling price.		
Multiple Item/Location Promotions	When selected in system options, an item/location can exist on more than one promotion (and more than one component within the promotion).		
Open Zone Use	When selected in system options, indicates that a zone can be used across different types of pricing, regardless of zone type.		
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.		
Planned sales			
Price Change	The permanent change in the price of an item.		
Price Change Diff Type	A default indicator to define the diff type that will be displayed when the user enters the price change and clearance dialogs. This default will only be applied in the price change/clearance dialogs when the Item level default is set to Parent / Diff Ty		
Price Change Item Level	Indicates the item level that is displayed when the user enters the price change and clearance dialogs.		

# Days Rejects Held	The number of days after the effective date of a rejected price change or clearance that it is purged from the system.		
Price Change Processing Days	The number of days between the creation date of a price change and the first date it can become effective. It allows the retailer to insure that price changes are created with enough advance timing that stores and other process areas can react.		
Price Change Type	On System Defaults, indicates the price change type that will be displayed when the user enters the price change and clearance dialogs. The options for the drop down list are:		
Price Change/Promotions Overlap	When selected in system options, indicates an item/location can have a price change occur during the middle of an active promotion.		
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.		
Pricing Strategy	The type of pricing strategy is the default that is displayed for the user when entering the Pricing Strategy workspace: Area Differential, Clearance, Competitive, or Margin		
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.		

# Days Rejects Held	The number of days after the effective date of a rejected price change or clearance that it is purged from the system.		
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.		
Promotion # Days Rejects Held	The number of days after the end date (or start date for promotions with no end date) of a rejected promotion that it is purged from the system.		
Promotion History Months	The number of months after a promotion is completed that is purged. This parameter is also used to purge cancelled promotions.		
Reason code	The resolution or reason that is applied to an event that occurs within a system.		
Rule Variable	The portion of the candidate rule conditions that allows a rule value to vary at the department level		
Simple Component	A component for which the items at specific locations are promoted at a percent off, amount off, or fixed price.		
standard cost			
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.		