

# **Oracle® Retail Mobile Merchandising**

User Guide

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Oracle Mobile Merchandising User Guide, Release 14.1.1

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# Preface

This document describes how to use Oracle Retail Mobile Merchandising Operations Management (MOM) Suite applications.

## Audience

This document is intended for System Administrators, Customer users, System Integrators who perform the following functions:

- Document specific security features and configuration details for the Oracle Retail MOM Suite products, in order to facilitate and support the secure operation of the Oracle Retail product and any external compliance standards.
- Guide administrators, developers, and system integrators on secure product implementation, integration, and administration. Functional and technical description of the problem (include business impact)

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## Related Documents

For more information, see the following documents:

- *Oracle Retail Mobile Merchandising Implementation Guide*
- *Oracle Retail Mobile Merchandising Installation Guide*
- *Oracle Retail Mobile Merchandising Security Guide*
- *Oracle Retail Mobile Merchandising Release Notes*

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- Product version and program/module name
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- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

## Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 14.1) or a later patch release (for example, 14.1.1). If you are installing the base release, additional patch, and bundled hot fix releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch and bundled hot fix releases can contain critical information related to the base release, as well as information about code changes since the base release.

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

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

If a more recent version of a document is available, that version supersedes all previous versions.

## Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following Web site:

<http://www.oracle.com/technology/documentation/oracle-retail-100266.htm>

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.





# Part I

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## Oracle Retail Mobile Applications

The following chapters provide guidance for System Administrators, Customer users, System Integrators who securely administer, customize, and integrate the Oracle Mobile Merchandising Applications.

Part I contains the following chapter:

[Mobile Merchandising Overview](#)



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# Mobile Merchandising Overview

This chapter describes the method by which you start the application, log on and off. It also describes the user interface controls in more detail.

The following topics are discussed in this chapter:

- [Getting Started](#)
- [Security](#)
- [Terminology](#)
- [Common User Interface Controls](#)

## Getting Started

Oracle Retail Mobile Merchandising has the following options:

- [Signing Into the Application](#)
- [Logging Out of the Application](#)

## Starting the Application

After the installation of the Oracle Retail Mobile Merchandising Applications and configuration of all handheld devices, the application can be started and the handheld devices accessed.

## Signing Into the Application

To sign into the application:

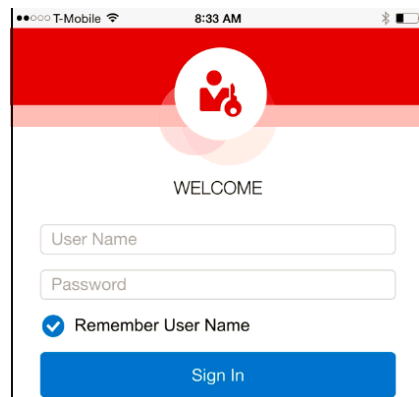
1. Access the handheld device.
2. Tap the Oracle Merchandising icon. The Welcome screen appears.

---

**Note:** The term tap is equivalent to click on handheld RF devices.

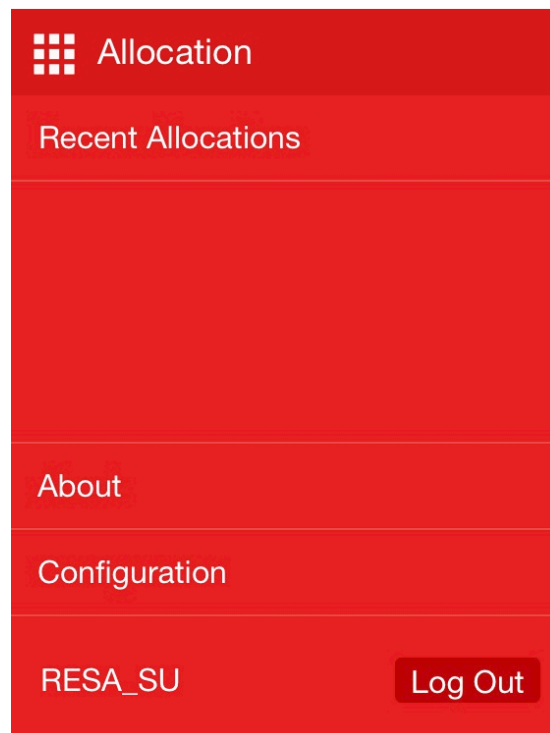
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**Figure 1–1 Welcome Screen**



3. On the Welcome screen, enter your user name in the **User Name** field.
4. Enter your password in the **Password** field.  
For information on how passwords are handled by this application, see [Passwords](#).
5. Select **Remember User Name** to remember the user name.
6. Tap **Sign In** to sign in to the application. After you sign in, the Application Switcher menu screen appears:

**Figure 1–2 Application Switcher Menu Screen**



## Logging Out of the Application

To logout of the application:

1. Tap **Log Out**. The Welcome screen appears. See [Figure 1–3](#).
  - If you are the only logged on user, you can log off without confirming the user name and password.

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**Note:** If you are the last user for the current business day, the application must be closed before you log off.

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**Figure 1–3 Logging Out of the Application**



## Locale Support

Locale support means tailoring the information displayed on a screen and accepting user entered data in a format that meets the conventions of the locale, or geographic region, where the application is being used. The application can be internationalized. For more information on localization, see *Oracle Retail Mobile Merchandising Implementation Guide*.

## Closing the Device

At the end of a business day, all registers and handheld devices must be closed to reconcile its transactions. Close the device only at the end of a business day. You need to access the application again to complete any transaction that you worked on before closing the device or on timeout.

To close the device:

1. From the Application Switcher menu screen, tap Log Out. See [Figure 1–2](#). The Welcome screen appears. See [Figure 1–1](#).
2. To verify closing, enter your user name and password. The device is now closed.

## Security

This section provides an overview of how security issues are handled.

### Passwords

Passwords are used to restrict access to Oracle Mobile Merchandising. The criteria passwords must meet are defined by the retailer. Requirements can include the definition of password length and content. For example, you may need to enter a password that is at least five but not more than ten characters and includes at least one numeric character. For information on your password requirements, consult your system administrator.

Password reset/expiry policy depends on the Lightweight Directory Access Protocol (LDAP) server policy that the application is configured to. You need to contact your system administrator for any password lockout or reset issues.

### Timeout Interval

If there has been no activity on your handheld device for a period of time, you will be automatically logged off and will need to log back on before you can perform any new

functions. Any transactions that have not been completed will be lost when the device times out.

## Terminology

Some terms are used in special ways with handheld devices:

**Tap, Select, Click:** User's action to execute a command such as a button click or selecting on a HTML link by a stylus or pen-shaped apparatus, typically supplied with the handheld devices.

**Type or Enter:** Enter alphanumeric text into the available data entry field using any means available, such as writing with the stylus or selecting letters or numbers from the on-screen keyboards.

## Common User Interface Controls

Oracle Retail applications, such as Oracle Retail Mobile Merchandising; include some common interface options and controls that you can use throughout the application workflow (Recent Allocation and ReSA). The following sections describe these user interface controls in more detail:

The following topics are covered in this section:







- [Navigation Tools](#)
- [Message Type](#)

## Navigation Tools





The navigation toolbar appears at the top of the navigation list. The toolbar buttons enable you to perform functions described in the following table.

[Table 1–1](#) lists the icons used throughout the Mobile Merchandising application.

**Table 1–1** *Icon Descriptions*

Icon/Button	Description	Function
	Application Switcher	Tapping this menu displays a list of functional flows like Recent Allocation and ReSA.
	Drawer	Tapping this icon from anywhere in the application displays the ReSA/ Allocation drawer menu.
	View Selector	Tapping this icon allows you to cycle through the four available Store Day Summary views in Sales Audit functional flow.
	Action Choice	Tapping this icon displays the action choice. Version 14.1.1 supports only email as the action choice.
	Arrow	Tapping the arrow icon, more details can be viewed.
	Back	Tapping this button returns to the previous page.





**Table 1–1 (Cont.) Icon Descriptions**

Icon/Button	Description	Function
	Search Reset	Tapping this icon clears the search criteria and allows to perform a new search.
	Data Sorter	Tapping this icon sorts the list of stores based on the selected sorting option.
	Search	A text box appears under the search criteria when this icon is tapped. From the Store Search screen, you can search by entering stores's ID, name, or assigned auditor's ID for ReSA. From the Recent Allocation screen, you can search by entering allocation ID or description for Allocation.
	Email	You can send an email to the auditors assigned to the selected stores by tapping this icon.

## Message Type

Table 1–2 lists the message type used throughout the Mobile Merchandising application.

**Table 1–2 Message icons**

Icon	Type	Function
	Error	The error messages identify problems related to data input, validation, or application functionality.
	Warning	The warning messages inform about pending actions or situations that may need attention.
	Confirmation	This confirms an action has completed successfully. Typically used to convey that an action took place (for example Product Item Added, Contact Removed).
	Information	Information messages inform the user about changes in the application that are not errors, warnings, or confirmations.





# Part II

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## Oracle Retail Sales Audit (ReSA)

Oracle Retail Sales Audit (ReSA) is a part of the Merchandise Operations Management (MOM) product group. The chapter mentioned below are for users and administrators of Oracle Retail Sales Audit. This includes System Administrators, Customer users, System Integrators.

Part II contains the following chapter:

- [Using Oracle Retail Mobile Merchandising ReSA](#)



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# Using Oracle Retail Mobile Merchandising ReSA

ReSA mobile consists of a Store Day Summary Dashboard. The topics in this chapter describe how to select, view, search, edit, cancel, and email in the ReSA Store Day Summary Dashboard.

The following topics are covered in this chapter:

- [ReSA Drawer Menu](#)
- [Application Switcher Menu](#)
- [Dashboard](#)
- [ReSA Navigation Model](#)
- [Store Day Summary Dashboard](#)
- [Open Store Days](#)
- [Store Day](#)
- [Store Search](#)
- [Store Detail](#)

---

**Note:** The toolbar buttons enable you to work with Mobile Merchandising applications. For information on the navigation toolbar, see [Navigation Tools](#) section in the [Mobile Merchandising Overview](#) chapter.

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## ReSA Drawer Menu

Tapping the **Drawer** icon from anywhere in the application displays the ReSA drawer menu. You will only see the options for which you have security access.

There are two Sales Audit workflow options in the ReSA Drawer menu:

- The Dashboard option launches the Store Day Summary dashboard with the Open Store Days view.
- The Store Search option launches the Store Search screen where you can search for a specific open store to view.

The following menus can be accessed from the ReSA Drawer menu:

- [Dashboard](#)
- [Store Search](#)

## Application Switcher Menu

Tapping the application switcher menu icon displays the ReSA and Recent Allocation drawer menu.

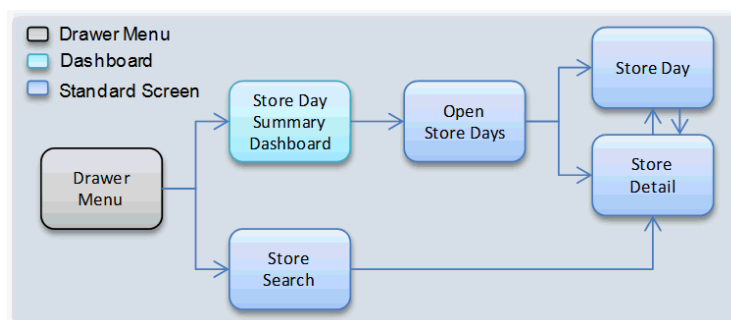
# Dashboard

The Dashboard displays automatically when you access ReSA Mobile. The Dashboard and Store Search workflows can both be accessed from the ReSA Mobile Drawer menu. The Store Day Details workflow is accessed through the Store Day Summary Dashboard and the Store Search workflows.

## ReSA Navigation Model

The following illustration shows a portion of a sample navigation model.

**Figure 2–1 ReSA Navigation Model**



## Store Day Summary Dashboard

You can see the following views in the Store Day Summary Dashboard:

- Store Day Summary - Open Store Days
- Store Day Summary - Over/Short (O/S) Store Days
- Store Day Summary - Over/Short (O/S) Sums
- Store Day Summary - Error Count

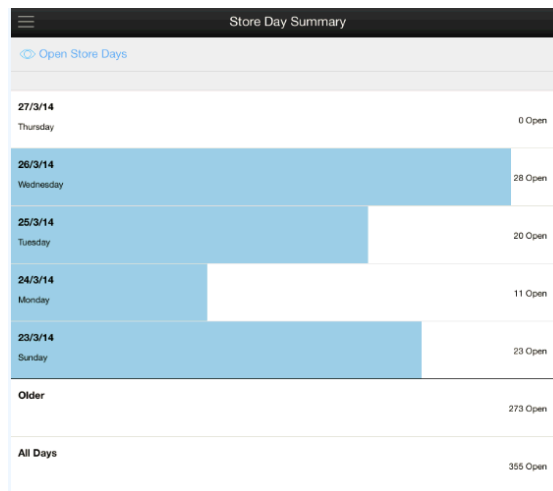
### Store Day Summary - Open Store Days

The Store Day Summary - Open Store Days provides the number of open stores for which the sales audit manager is responsible. The stores for which you are responsible are those associated with you in ReSA's employee maintenance using location traits.

## Viewing a Store Day Summary - Open Store Days

To view the Store Day Summary - Open Store Days:

1. From the Application Switcher menu screen, tap **Dashboard**. The Store Day Summary - Open Store Days screen appears.

**Figure 2–2 Store Day Summary - Open Store Days Screen**

2. Tap the **View Selector** icon Open Store Days to cycle through the four available Store Day Summary views. Tapping and holding the bar displays a menu of the available views allowing you to select the desired view directly.
3. There are seven sections displayed in the Store Day Summary - Open Store Days view.
  - The first five sections contain the five most recent days, starting with yesterday (today's date minus 1).
  - The date is displayed on the left side of the section with the day of the week displayed below it. The five dates displayed are today minus 1 through today minus 5.
  - The right side of the section contains the count of open stores to which you are assigned for the date followed by the word Open. If no open stores are found the count is displayed as 0 Open.
  - The length of the blue bar represents the number of open stores for each section except the Older and All Days sections.
  - After the fifth section a separator divides the individual; date and Older section.

**Figure 2–3 An example of visual separator between the individual date and older sections**

4. If there are open stores to which you are assigned for dates beyond the initial five days (open days before today minus 5), the count of those stores is displayed in the section labeled Older. If no open stores are found the section will still display with a count of 0 Open.

Figure 2–4 Older Label Section



- 5. A total count of all open stores to which you are assigned is displayed in the section labeled All Days.

Figure 2–5 All Days Label Section



- 6. You can view more details by tapping the **Arrow** icon on the extreme right side of the section. The Open Store Days screen appears. See Figure 2–6.

Open Store Days

This section contains the following information about open store days:

- [Viewing an Open Store Days](#)
- [Editing an Open Store Days](#)
- [Sending an Email](#)

The Open Store Days screen displays a list of open stores to which you are assigned. These can be for a single day, for all Older days, or for All Days.

Figure 2–6 Viewing Open Store Days for a Single Day

Open Store Days		
Select Date		24/3/14
By Store	≡	⌕ O/S Value
A's Comp Virtual Store		
333333		-150.00 USD
Auditor: AUDITOR MANAGER.FINANCE MANAGER		
A's Resa Store		
111111		0.00 USD
Auditor: AUDITOR.AUDITOR MANAGER		
ALLOC_QA_Store_4_Franchise_555742180		
555742180		0.00 USD
Auditor: AUDITOR MANAGER.FINANCE MANAGER		
Long store name ABCDEFGHIJKLMNOPQRSTUVWXYZ		
222222222		250.00 INR
Auditor: AUDITOR MANAGER.FINANCE MANAGER		
ReIM_A_Franchise Store, With VAT Region 1000, Stockholding = Y_2_533842923		
533842923		1,500.00 USD
Auditor: AUDITOR MANAGER.FINANCE MANAGER		
ReSA Comp Non STK USD		
1000000003		500.00 USD
Auditor: AUDITOR MANAGER.FINANCE MANAGER		
ReSA Comp Store IGTAX USD		
1000000000		2,344.00 USD
Auditor: AUDITOR.AUDITOR MANAGER		
ReSA Comp TTAX Store USD		
1000000001		2,500.00 USD
Auditor: AUDITOR.AUDITOR MANAGER		
ReSA Franchise Store USD		
1000000004		0.00 USD
Auditor: AUDITOR MANAGER.FINANCE MANAGER		
Store 5 Alloc Testing		
115		0.00 USD
Auditor: AUDITOR MANAGER.FINANCE MANAGER		
Test_Store_1011		
1011		0.00 USD
Auditor: AUDITOR MANAGER.FINANCE MANAGER		

**Figure 2–7 Viewing Open Store Days for Older Days**

Open Store Days			Older >
Select Date			
By Store	≡	Open Days	
A's Comp Virtual Store 333333 Auditor: RESA_AUDITOR			5 Open >
A's Resa Store 111111 Auditor: AUDITOR,RESA_ADMINISTRATOR			15 Open >
A's Resa TTAX Store 222222 Auditor: AUDITOR,AUDITOR_MANAGER			18 Open >
ALLOC_QA_Store_2_255424290 255424290 Auditor: AUDITOR_MANAGER,FINANCE_MANAGER			29 Open >
ALLOC_QA_Store_4_Franchise_555742180 555742180 Auditor: AUDITOR_MANAGER,FINANCE_MANAGER			31 Open >
Long store name ABCDEFGHIJKLMNOPQRSTUVWXYZ 2222222222 Auditor: RESA_AUDITOR			18 Open >
ReIM_A_Company Store, With VAT Region 1000, Stockholding = Y_1_959686988 959686988 Auditor: AUDITOR_MANAGER,FINANCE_MANAGER			30 Open >
ReIM_A_Franchise Store, With VAT Region 1000, Stockholding = Y_2_533842923 533842923 Auditor: RESA_AUDITOR			29 Open >
ReSA Comp Fuel Store USD 1000000002 Auditor: RESA_AUDITOR			9 Open >
ReSA Comp Non STK USD 1000000003 Auditor: RESA_AUDITOR			9 Open >

**Figure 2–8 Viewing Open Store Days for All Days**

Open Store Days			All Days >
Select Date			
By Store	≡	Open Days	
222str 222 Auditor: RESA_AUDITOR			1 Open >
223franchise 223 Auditor: RESA_AUDITOR			1 Open >
A's Comp Virtual Store 333333 Auditor: RESA_AUDITOR			9 Open >
A's Resa Store 111111 Auditor: AUDITOR,RESA_ADMINISTRATOR			18 Open >
A's Resa TTAX Store 222222 Auditor: AUDITOR,AUDITOR_MANAGER			21 Open >
ALLOC_QA_Store_2_255424290 255424290 Auditor: AUDITOR_MANAGER,FINANCE_MANAGER			32 Open >
ALLOC_QA_Store_4_Franchise_555742180 555742180 Auditor: AUDITOR_MANAGER,FINANCE_MANAGER			35 Open >
Compnay T 32323 Auditor: RESA_AUDITOR			2 Open >

## Viewing an Open Store Days

To view an open store days:

1. From the Store Day Summary - Open Store Days screen, tap the **Arrow** icon. The Open Store Days screen appears.

Figure 2–9 Open Store Days Screen

Open Store Days		
Select Date		24/3/14
By Store	≡	O/S Value
A's Comp Virtual Store		
333333		-150.00 USD
Auditor: AUDITOR MANAGER FINANCE MANAGER		
A's Resa Store		
111111		0.00 USD
Auditor: AUDITOR AUDITOR MANAGER		
ALLOC_QA_Store_4_Franchise_555742180		
555742180		0.00 USD
Auditor: AUDITOR MANAGER FINANCE MANAGER		
Long store name ABCDEFGHIJKLMNOPQRSTUVWXYZ		
222222222		250.00 INR
Auditor: AUDITOR MANAGER FINANCE MANAGER		
ReIM_A_Franchise Store, With VAT Region 1000, Stockholding = Y_2_533842923		
533842923		1,500.00 USD
Auditor: AUDITOR MANAGER FINANCE MANAGER		
ReSA Comp Non STK USD		
1000000003		500.00 USD
Auditor: AUDITOR MANAGER FINANCE MANAGER		
ReSA Comp Store IG TAX USD		
1000000000		2,344.00 USD
Auditor: AUDITOR AUDITOR MANAGER		
ReSA Comp TTAX Store USD		
1000000001		2,500.00 USD
Auditor: AUDITOR AUDITOR MANAGER		
ReSA Franchise Store USD		
1000000004		0.00 USD
Auditor: AUDITOR MANAGER FINANCE MANAGER		
Store 5 Alloc Testing		
115		0.00 USD
Auditor: AUDITOR MANAGER FINANCE MANAGER		
Test_Store_1011		
1011		0.00 USD
Auditor: AUDITOR MANAGER FINANCE MANAGER		

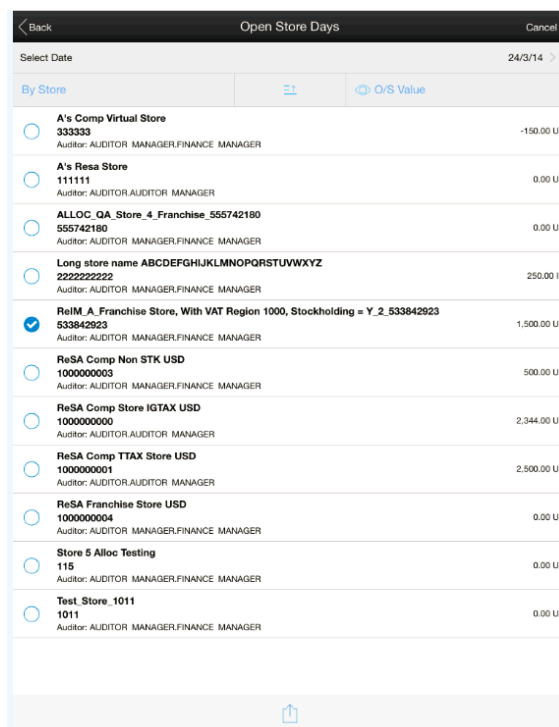
- 2. To return to the previous screen, tap **Back** or tap the **Back** icon. The Store Day Summary dashboard appears. See [Figure 2–2](#).

Editing an Open Store Days

To edit open store days:

- 1. From the Open Store Days screen, tap **Edit**. The selection circles appears next to each store and an **Action Choice** icon displays at the bottom of the screen.



**Figure 2–10 Selecting a Store**

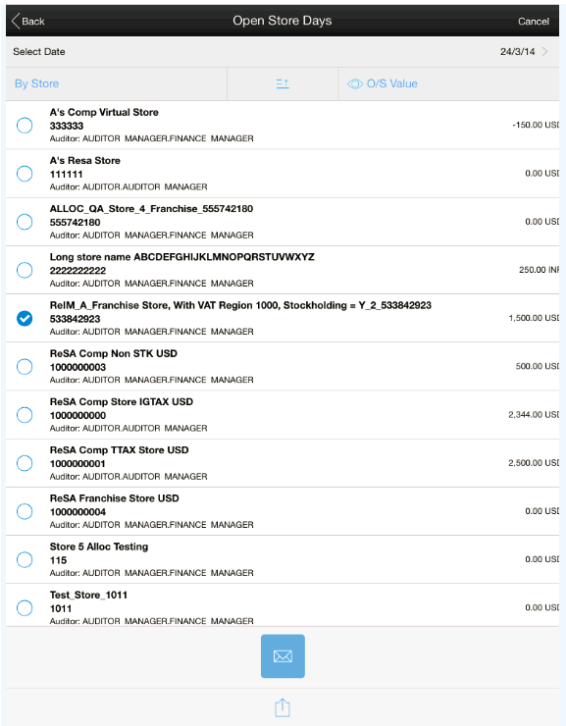
2. You can select one or more stores and send an email to the auditors assigned to the selected stores. For information on sending an email, see [Sending an Email](#) section.

## Sending an Email

To send an email:

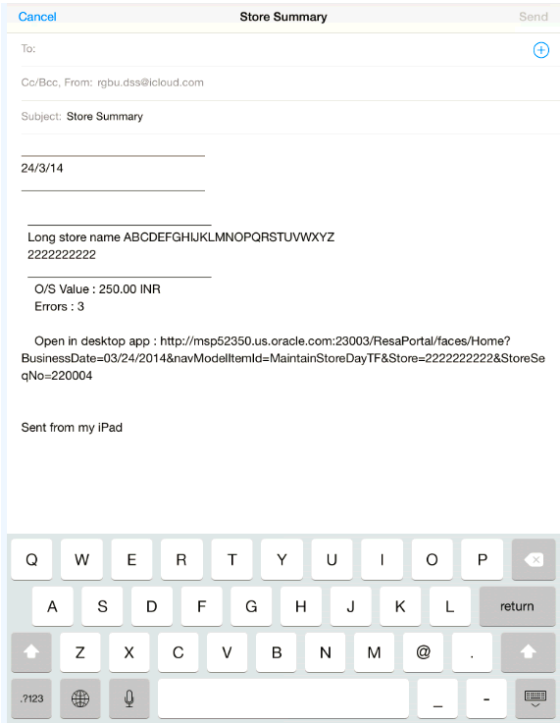
1. From the Open Store Days screen, tap **Edit**. A selection circles appears next to each store.
2. Select a store. The **Action Choice** icon appears at the bottom of the screen. See [Figure 2–10](#).
3. Tap the **Action Choice** icon. The **Email** icon appears at the bottom of the screen.

Figure 2–11 Sending an Email



4. Tap the **Email** icon. The email generated appears in the Store Summary screen.

Figure 2–12 Email Generated in the Store Summary Screen



**Table 2–1 Store Day Summary - Email Descriptions**

Field	Description
To	By default the To field is blank. Enter or select the appropriate recipients. Clicking the plus sign (+) displays the All Contacts section. You can search the recipients by clicking the <b>Search</b> icon.
Cc	By default the Cc field is blank. Enter or select the appropriate recipients. Clicking the plus sign (+) displays the All Contacts section. You can search the recipients by clicking the <b>Search</b> icon.
Bcc	By default the Bcc field is blank. Enter or select the appropriate recipients. Clicking the plus sign (+) displays the All Contacts section. You can search the recipients by clicking the <b>Search</b> icon.
From	This field is system generated and you can edit it.
Subject	<p>The subject of the email is displayed. This field is system generated and you can edit it.</p> <p>The following details are displayed:</p> <ul style="list-style-type: none"> <li>■ Store/business date</li> <li>■ Store Name</li> <li>■ Store ID</li> <li>■ Chain Name</li> <li>■ O/S Value</li> <li>■ Errors</li> <li>■ Message containing Open in desktop app followed by a hyperlink/URL</li> </ul>

5. You can add additional comments prior to sending the email.

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**Note:** Copying and pasting the URL included in the email into a browser, enables the recipient to launch directly into the ReSA desktop application to the Store Day Summary screen for the specific store day.

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6. Tap **Send** to send the email.
7. You can either delete or save the draft by tapping **Cancel**. The following screen appears.

**Figure 2–13 Deleting or Saving the Draft**

The screenshot shows a mobile application interface for a 'Store Summary'. At the top, there are three buttons: 'Cancel' on the left, 'Store Summary' in the center, and 'Send' on the right. Below these is a white box containing two buttons: 'Delete Draft' in red text and 'Save Draft' in blue text. Underneath the box, the text 'Subject: Store Summary' is displayed. The main body of the form contains several fields: a date field with '24/3/14', a long text field with 'Long store name ABCDEFGHIJKLMNOPQRSTUVWXYZ 2222222222', a field for 'O/S Value : 250.00 INR' and 'Errors : 3', and a URL field with 'Open in desktop app : http://msp52350.us.oracle.com:23003/ResaPortal/faces/Home?BusinessDate=03/24/2014&navModelItemId=MaintainStoreDayTF&Store=2222222222&StoreSeqNo=220004'. At the bottom, it says 'Sent from my iPad'.

## Store Day Details Workflow

The Store Day Details workflow is accessed through the Store Day Summary dashboard and the Store Search workflow.

This section contains the following topics about viewing Open Store Days:

- [Open Store Days - Single Day View](#)
- [Open Store Days - Older View](#)
- [Open Store Days - All Days View](#)

### Open Store Days - Single Day View

When you select a single day from the Store Day Summary dashboard, the Open Store Days screen displays all open stores to which you are assigned for the selected day. In this scenario, there are only two available views, the Over/Short Value view and the Error Count view. By default when you first view this screen, the data is sorted by Store (alphabetically by store name) and the O/S Value view is displayed. If there are no open stores for the selected date, the no data to display message appears. This is the same text that appears in search results in the ReSA ADF desktop application. See [Figure 2–6](#).

### Open Store Days - Older View

When you select the Older section from the Store Day Summary dashboard, the Open Store Days screen displays all open stores assigned to you for all days older than the current date minus 5. In this scenario, there are four available views; Open Days, O/S Days, O/S Sums, and Error Count. When you first view this screen the data is sorted By Store (alphabetically by store name) and the Open Days view is displayed. If there are no open stores for the selected date, the no data to display message appears. This is the same text that appears in search results in the ReSA ADF desktop application. See [Figure 2–7](#).

### Open Store Days - All Days View

When you select the All Days section from the Store Day Summary dashboard the Open Store Days screen displays all open stores assigned to you for all days. If there are no open stores for the selected date, the no data to display message appears. This is

the same text that appears in search results in the ReSA ADF desktop application. See [Figure 2–8](#).

## Store Day Summary - Over/Short (O/S) Store Days

The Store Day Summary - Over/Short Store Days view provides the count of overages and the count of shortages for all open stores on a given day for which the sales audit manager is responsible. If the Over/Short value for the store day is a positive value it is considered an overage; if the Over/Short value for the store day is a negative value it is a shortage.

This section contains the following topic to help you understand and manage over/short store days:

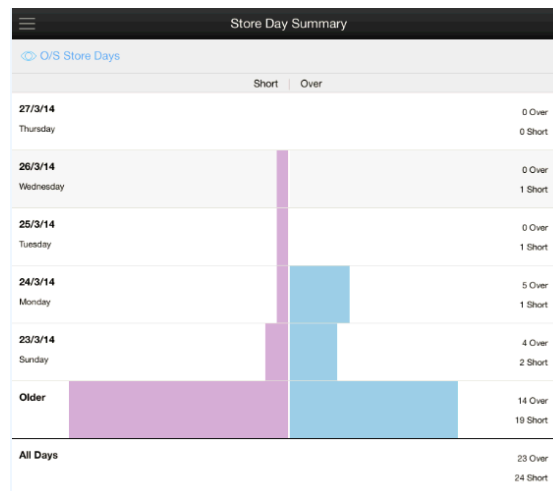
- [Viewing a Store Day Summary - Over/Short Store Days](#)

### Viewing a Store Day Summary - Over/Short Store Days

To view the Store Day Summary - Over/Short Store Days:

1. From the Store Day Summary - Open Store Days, tap the **View Selector** icon. The Store Day Summary - O/S Store Days screen appears.

**Figure 2–14 Store Day Summary - O/S Store Days Screen**



2. Tap the **View Selector** icon O/S Store Days to cycle through the four available Store Day Summary views. Tapping and holding the bar displays a menu of the available views allowing you to select the desired view directly.
3. The screen is divided into two halves. The length of the bar is proportionate to the shortfall/surplus.
4. There are seven sections displayed in this view.
  - The first five sections contain the five most recent days, starting with yesterday (today's date minus 1), each containing the count of overages for open stores and the count of shortages for open stores to which you are assigned.

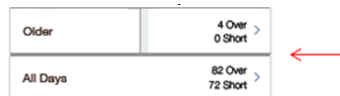
- The date is displayed on the left side of the section with the day of the week displayed below it. The five dates displayed are today minus 1 through today minus 5.
  - The right side of the section contains the count of open stores to which you are assigned for the date followed by the word Over and the count of open stores to which you are assigned with shortages for the date followed by the word Short. The shortage count appears below the overage count. If no stores are found the count will be 0 Over or 0 Short.
  - This view displays Over Short Store days, basically number of stores which have either over or short totals for that date.
5. The Older label displays the counts of overages and shortages of stores prior to the first five dates. If no overages or shortages are found, the section will still display with a count of 0 Over, or 0 Short.

**Figure 2–15 The section displaying with a count of 0 Over, or 0 Short**



6. A separator divides the sections containing the graphical visual and the sections that are not a part of the graph. In this view the separator is between the Older and the All Days section.

**Figure 2–16 An example of a visual separator between sections**



7. A total count of all overages and shortages for open stores to which you are assigned is displayed in the section labeled All Days.

**Figure 2–17 All Days Label Section**



8. You can view more details by tapping the **Arrow** icon on the extreme right side of the section. The Open Store Days screen appears. See [Figure 2–6](#).

## Store Day Summary - Over/Short (O/S) Sums

The Store Day Summary - Over/Short Store Sums view provides the sums of all overages and all shortages for all open stores on a given day for which the sales audit manager is responsible. If all locations to which you are responsible have the same local currency, all monetary values are displayed in the local currency. Otherwise, all monetary values are displayed in the retailer's primary currency. If the Over/Short value for the store day is a positive value it is considered an overage; if the Over/Short value for the store day is a negative value it is a shortage.

This section contains the following topic to help you understand and manage over/short sums:

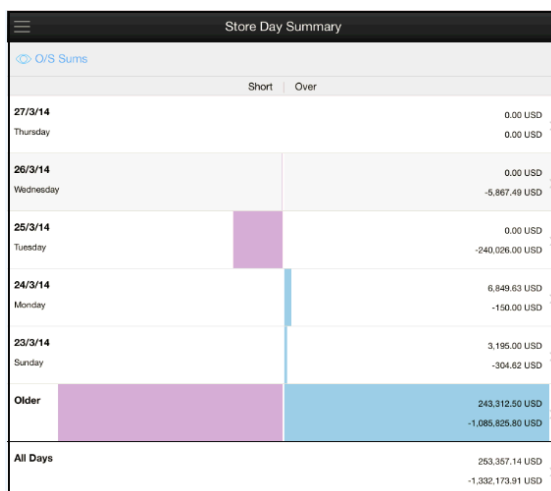
- [Viewing a Store Day Summary - Over/Short Sums](#)

## Viewing a Store Day Summary - Over/Short Sums

To view the Store Day Summary - Over/Short Sums:

1. From the Store Day Summary - Open Store Days, tap the **View Selector** icon. The Store Day Summary - O/S Sums screen appears.

**Figure 2–18 Store Day Summary - O/S Sums Screen**



2. Tap the **View Selector** icon O/S Sums to cycle through the four available Store Day Summary views. Tapping and holding the bar displays a menu of the available views allowing you to select the desired view directly.
3. The screen is divided into two halves. The length of the bar is proportionate to the shortfall/surplus.
4. There are seven sections displayed in this view. The first five sections contain the five most recent days, starting with yesterday (today's date minus 1); each containing the sum of overages for open stores and the sum of shortages for open stores.
  - The first five sections contain the five most recent days, starting with yesterday (today's date minus 1), each containing the sum of overages for open stores and the sum of shortages for open stores.
  - The date is displayed on the left side of the section with the day of the week displayed below it. The five dates displayed are today minus 1 through today minus 5.
  - The right side of the section contains the sum of all overages for open stores to which you are assigned for the date, followed by the sum of all shortages for open stores with the currency. The short value is preceded with a -. If no stores are found with an over or short value, a zero value is displayed rather than leaving the section blank. The over and short total values are represented in local or retailers primary currency.
  - The left portion of the bar represents shortages and the right portion of the negative stack bar represents overages. The red/blue for shortages/overages respectively is the percentage representation of the shortage/overage value for open stores for a specific day, assuming the width of each halves of the stack bar represents all possible open stores to which one is assigned.

- The Older label displays the sums of overages and shortages of open stores prior to the first five dates. If no overages or shortages are found, the section will still display with a sum of zero rather than leaving it blank.

**Figure 2–19 The section displaying the sums of overages and shortages of open stores prior to the first five dates**

Older	120.00 USD - 65.24 USD >
-------	-----------------------------

- A separator provides a visual separation between the sections containing the graphical visual of the blue bars and the sections that are not a part of the graph. In this view the separate is between the Older and the All Days section.

**Figure 2–20 A separator between the sections containing the graphical visual of the blue bars and the sections that are not a part of the graph**

Older	120.00 USD - 65.24 USD >
All Days	120.00 USD - 65.24 USD >

- A sum of all overages and shortages for all open stores to which you are assigned is displayed in the section labeled All Days.

**Figure 2–21 All Days Label Section**

All Days	120.00 USD - 65.24 USD >
----------	-----------------------------

- You can view more details by tapping the **Arrow** icon on the extreme right side of the section. The Open Store Days screen appears. See [Figure 2–6](#).

## Store Day Summary - Error Count

The Store Day Summary - Error Count view provides the number of outstanding errors on the specified days for stores for which the sales audit manager is responsible. An outstanding error is defined as an error that exists against a store day that has not been overridden.

This section contains the following topic to help you understand and manage the error count:

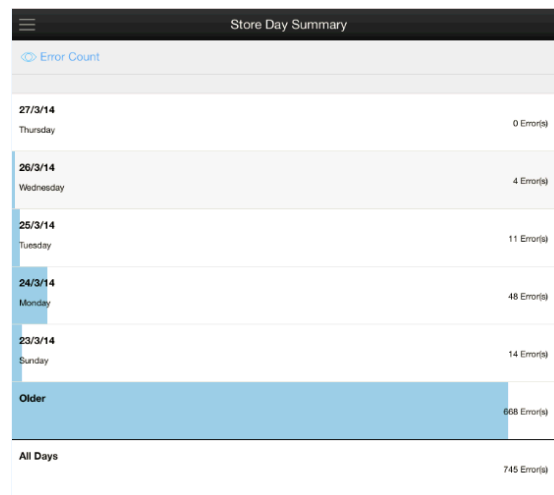
- [Viewing a Store Day Summary - Error Count](#)

### Viewing a Store Day Summary - Error Count

To view the Store Day Summary - Error Count:

- From the Store Day Summary - Open Store Days, tap the **View Selector** icon. The Store Day Summary - Error Count screen appears.



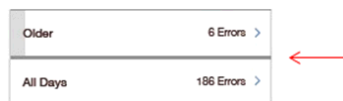
**Figure 2–22 Store Day Summary - Error Count Screen**

2. Tap the **View Selector** icon Error Count to cycle through the four available Store Day Summary views. Tapping and holding the bar displays a menu of the available views allowing you to select the desired view directly.
3. There are seven sections displayed in the Store Day Summary - Error Count view.
  - The first five sections contain the most recent days, starting with yesterday (today's date minus 1), each containing the number of outstanding errors.
  - The date is displayed on the left side of the section with the day of the week displayed below it. The five dates displayed are today minus 1 through today minus 5.
  - The right side of the section contains the count of outstanding errors for the date, followed by the word Errors. If no outstanding errors are found the count will be 0 Errors.
  - A visual representation of the error count is displayed in each section except for the All Days section. A blue bar representing the number of errors fills each section. Assuming the width of the screen represents all outstanding errors, the percentage of outstanding errors for the specified date out of total outstanding errors for all open store days is used to fill the same percentage of the section. If there are 100 errors and 50 of the errors occurred against stores on the specified day, then 50% of the section will be blue, the bar extends exactly halfway across the screen.
4. The Older label displays the counts of outstanding errors for store days to which you are assigned prior to the first five dates.

**Figure 2–23 An Example of counts of outstanding errors for store days prior to the first five dates**

5. A separator divides the sections containing the graphical visual of the blue bars and the sections that are not a part of the graph. In this view the separate is between the Older and the All Days section.

**Figure 2–24 Visual separator between the sections containing the graphical visual of the blue bars and the sections that are not a part of the graph**



6. A total count of outstanding errors for all store days is displayed in the section labeled All Days.

**Figure 2–25 All Days Label Section**



7. You can view more details by tapping the **Arrow** icon on the extreme right side of the section. The Open Store Days screen appears. See [Figure 2–6](#).

## Store Day

The Store Day screen displays details about a specific store day. You can access the Store Days from the Open Store Days - Single Day screen (see [Figure 2–6](#)) or from the Store Detail screen (see [Figure 2–34](#)).

This section contains the following topics to help you search view a store day and to send an email:

- [Viewing a Store Day](#)
- [Sending an Email](#)

### Viewing a Store Day

To view a store day:

1. From the Application Switcher menu screen, tap Dashboard. The Store Day Summary - Open Store Days screen appears. See [Figure 2–2](#).
2. From the Store Day Summary - Open Store Days screen, tap the **Arrow** icon. The Open Store Days screen appears. See [Figure 2–9](#).
3. From the Open Store Days screen, tap the **Arrow** icon. The Store Day screen appears.

**Figure 2–26 Store Day Screen**

ReSA Comp Store IGTAX USD	
Audit Status	Re-Totaling/Auditing Required
Audit Changed	24/11/14 2:33:28 PM GMT+5:30
Data Status	
Over/Short	2,344.00 USD
Errors	0
Transactions	1
Files Loaded	1
Files Expected	Unknown





**Table 2–2 Store Day Screen Descriptions**

Field	Description
Audit Status	The audit status of the store day, based on code type Sales Audit Audit Status (SAAS).
Audit Changed	Contains the date/time of the most recent change to the audit status for the store day.
Data Status	Each store day is assigned a data status. This is shown in the form of a Harvey Ball giving a visual representation of the current status. The status shows whether sales records for the day have been loaded in ReSA such that auditor can work or not.  For information on data statuses, see <a href="#">Table 2–3</a> .
Over/Short	This field is system generated and user editable.
Errors	The subject of the email is displayed. This field is system generated and user editable.  The following details are displayed: <ul style="list-style-type: none"> <li>Store/business date</li> <li>Store Name</li> <li>Store ID</li> <li>Chain Name</li> <li>O/S Value</li> <li>Errors</li> <li>Message containing Open in desktop app followed by a hyperlink/URL</li> </ul>
Transactions	This field is system generated and user editable.
Files Loaded	This field is system generated and user editable.

**Table 2–2 (Cont.) Store Day Screen Descriptions**

Field	Description
Files Expected	This field is system generated and user editable.

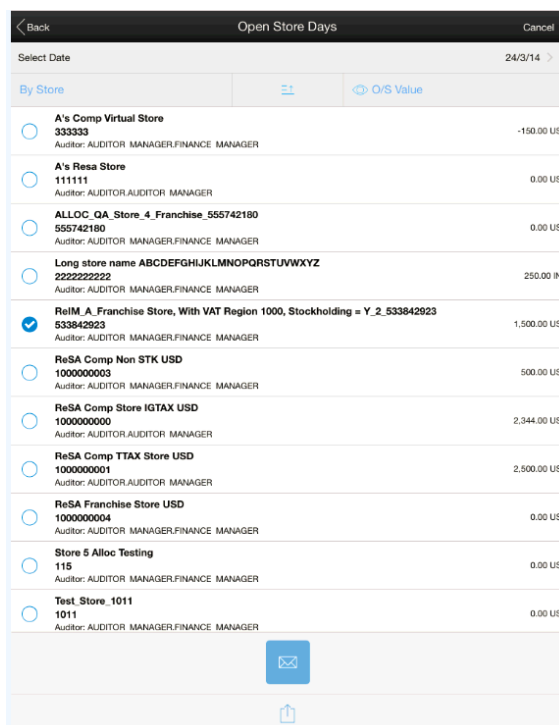
**Table 2–3 Data Status**

Status	Harvey Representation
R- Ready for import	
L- Loading	
P- Partially Load	
F- Fully Load	

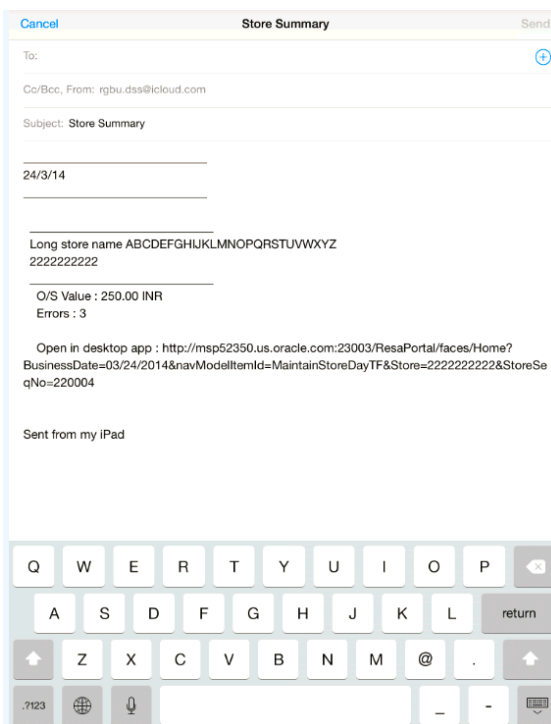
## Sending an Email

To send an email:

1. From the Store Day Summary - Open Store Days screen, tap the **Arrow** icon. The Open Store Days screen appears. See [Figure 2–9](#).
2. From the Open Store Days screen, tap **Edit**. The selection circles appears next to each store and an action menu displays at the bottom of the screen. See [Figure 2–10](#).
3. Select a store. The **Action Choice** icon appears at the bottom of the screen. See [Figure 2–10](#).
4. Tap the **Action Choice** icon. The **Email** icon appears.

**Figure 2–27 Sending an Email**

5. Tap the **Email** icon. The email generated appears in the Store Summary screen.

**Figure 2–28 Email Generated in the Store Summary Screen**

**Table 2–4 Store Day Summary - Email Descriptions**

Field	Description
To	By default the To field is blank. Enter or select the appropriate recipients. Clicking the plus sign (+) sign displays the All Contacts section. You can search the recipients by clicking the <b>Search</b> icon.
Cc	By default the Cc field is blank. Enter or select the appropriate recipients. Clicking the plus sign (+) displays the All Contacts section. You can search the recipients by clicking the <b>Search</b> icon.
Bc c	By default the Bcc field is blank. Enter or select the appropriate recipients. Clicking the plus sign (+) displays the All Contacts section. You can search the recipients by clicking the <b>Search</b> icon.
From	This field is system generated and you can edit it.
Subject	<p>The subject of the email is displayed. This field is system generated and you can edit it.</p> <p>The following details are displayed:</p> <ul style="list-style-type: none"> <li>■ Store/business date</li> <li>■ Store Name</li> <li>■ Store ID</li> <li>■ Chain Name</li> <li>■ O/S Value</li> <li>■ Errors</li> <li>■ Message containing Open in desktop app followed by a hyperlink/URL</li> </ul>

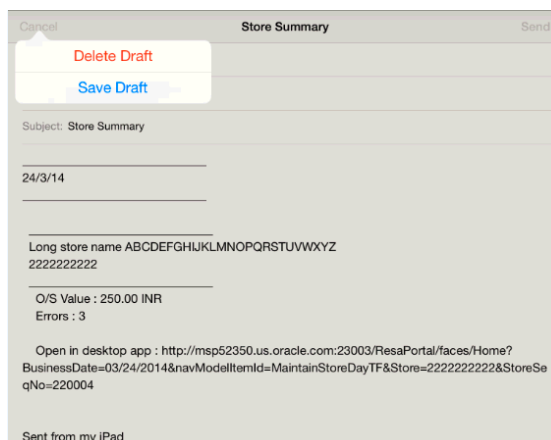
6. You can add additional comments prior to sending the email.

---

**Note:** The URL from the email can be copied and pasted into a browser. This allows the recipient to launch directly into the ReSA desktop application to the Store Day Summary screen for the specific store day.

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7. Tap **Send** to send the email.
8. You can either delete or save the draft by tapping **Cancel**. The following screen appears.

**Figure 2–29 Deleting or Saving the Draft**

## Store Search

You can search for a specific open store by entering some basic criteria in the Store Search option.

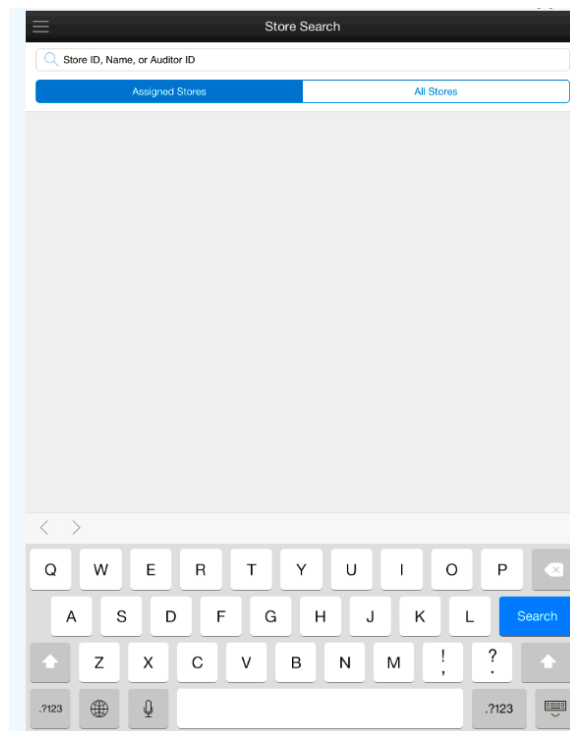
This section contains the following topics to help you search a store and view store search results:

- [Searching for a Store](#)
- [Viewing Store Search Results](#)

### Searching for a Store

To Search for a Store:

1. From the Drawers menu, tap **Store Search**. The Store Search screen appears.

**Figure 2–30 Store Search Screen**

2. Tap the **Search** icon and enter one of the three following items to start a search:

- Store ID
- Name
- Auditor ID

The onscreen keyboard appears.

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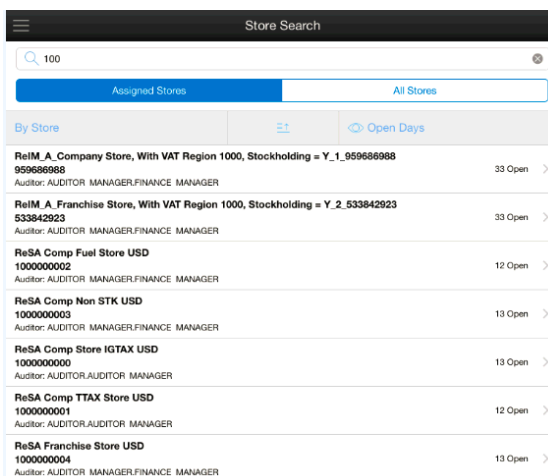
**Note:** You must enter a minimum of three characters to perform a search.

---

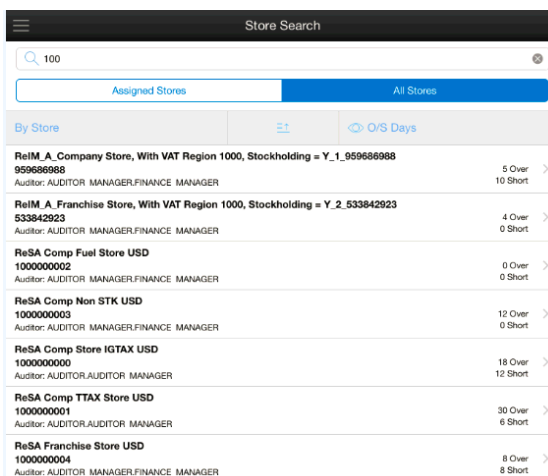
---

3. Tap the **Search** button displayed on the onscreen keyboard to execute a search based on the entered search value and the Search Results Filter.
4. You can either search for all stores to which you are assigned or can access based on data security defined in RMS/ReSA. By default, the search results filter is set to Assigned Stores. See [Figure 2–31](#) and [Figure 2–32](#) for search based on Assigned Stores and search based on All Stores.
5. Enter search criteria to find the store by using the onscreen keyboard.



**Figure 2–31 Search based on Assigned Stores**


Store Search	
100	
Assigned Stores All Stores	
By Store	Open Days
ReIM_A Company Store, With VAT Region 1000, Stockholding = Y_1_959686988 959686988 Auditor: AUDITOR MANAGERFINANCE MANAGER	33 Open >
ReIM_A Franchise Store, With VAT Region 1000, Stockholding = Y_2_533842923 533842923 Auditor: AUDITOR MANAGERFINANCE MANAGER	33 Open >
ReSA Comp Fuel Store USD 1000000002 Auditor: AUDITOR MANAGERFINANCE MANAGER	12 Open >
ReSA Comp Non STK USD 1000000003 Auditor: AUDITOR MANAGERFINANCE MANAGER	13 Open >
ReSA Comp Store IGTAX USD 1000000000 Auditor: AUDITOR AUDITOR MANAGER	13 Open >
ReSA Comp TTAX Store USD 1000000001 Auditor: AUDITOR AUDITOR MANAGER	12 Open >
ReSA Franchise Store USD 1000000004 Auditor: AUDITOR MANAGERFINANCE MANAGER	13 Open >

**Figure 2–32 Search based on All Stores**


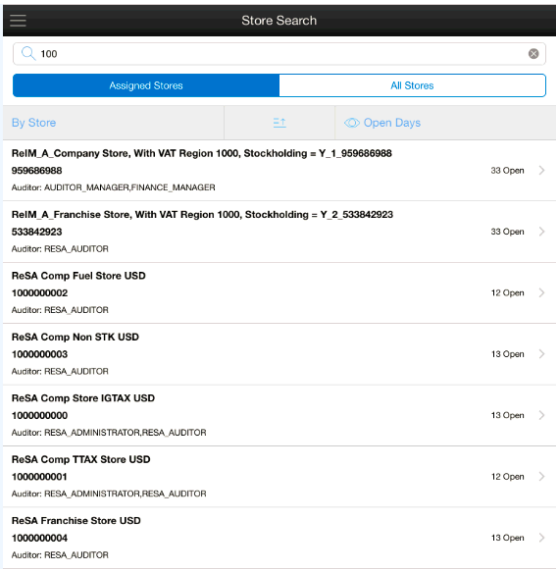
Store Search	
100	
Assigned Stores All Stores	
By Store	O/S Days
ReIM_A Company Store, With VAT Region 1000, Stockholding = Y_1_959686988 959686988 Auditor: AUDITOR MANAGERFINANCE MANAGER	5 Over 10 Short >
ReIM_A Franchise Store, With VAT Region 1000, Stockholding = Y_2_533842923 533842923 Auditor: AUDITOR MANAGERFINANCE MANAGER	4 Over 0 Short >
ReSA Comp Fuel Store USD 1000000002 Auditor: AUDITOR MANAGERFINANCE MANAGER	0 Over 0 Short >
ReSA Comp Non STK USD 1000000003 Auditor: AUDITOR MANAGERFINANCE MANAGER	12 Over 0 Short >
ReSA Comp Store IGTAX USD 1000000000 Auditor: AUDITOR AUDITOR MANAGER	18 Over 12 Short >
ReSA Comp TTAX Store USD 1000000001 Auditor: AUDITOR AUDITOR MANAGER	30 Over 6 Short >
ReSA Franchise Store USD 1000000004 Auditor: AUDITOR MANAGERFINANCE MANAGER	8 Over 8 Short >

## Viewing Store Search Results

To view Store Search Results:

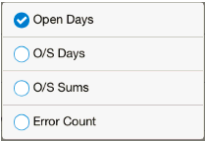
1. From the Store Search screen Assigned Stores or All Stores column, tap the **Search** **Reset** icon. The **Search** **Reset** icon clears the search criteria and allows you to perform a new search.

Figure 2–33 Store Search Results Screen



By Store	Open Days
ReIM_A Company Store, With VAT Region 1000, Stockholding = Y_1_959686988 959686988 Auditor: AUDITOR_MANAGER,FINANCE_MANAGER	33 Open >
ReIM_A Franchise Store, With VAT Region 1000, Stockholding = Y_2_533842923 533842923 Auditor: RESA_AUDITOR	33 Open >
ReSA Comp Fuel Store USD 1000000002 Auditor: RESA_AUDITOR	12 Open >
ReSA Comp Non STK USD 1000000003 Auditor: RESA_AUDITOR	13 Open >
ReSA Comp Store IG TAX USD 1000000000 Auditor: RESA_ADMINISTRATOR,RESA_AUDITOR	13 Open >
ReSA Comp TTAX Store USD 1000000001 Auditor: RESA_ADMINISTRATOR,RESA_AUDITOR	12 Open >
ReSA Franchise Store USD 1000000004 Auditor: RESA_AUDITOR	13 Open >

- 2. Tap the **Data Sorter** icon to sort the list of stores based on the selected sorting option. Tapping the **Data Sorter** icon the second time reverses the sorted list.
- 3. You can either tap the **View Selector** icon to cycle through the four available Store Day Summary views; or tap and hold the **View Selector** icon to display the menus of the available views allowing you to select the desired view directly. The following dialog appears:



<input checked="" type="radio"/> Open Days
<input type="radio"/> O/S Days
<input type="radio"/> O/S Sums
<input type="radio"/> Error Count

- The stores matching the entered search value is displayed. If no matching records are found, the no text to display message appears.
  - The store name, store ID, and the auditor's application user ID is displayed.
  - The store's associated value depending on the view selected is displayed.
- 4. You can view more details by tapping the **Arrow** icon on the extreme right side of the section. The Open Store Details screen appears.

Store Detail

The Store Detail screen displays with the same store list with the selected store highlighted.

This section contains the following topics to help you view and edit the store details:

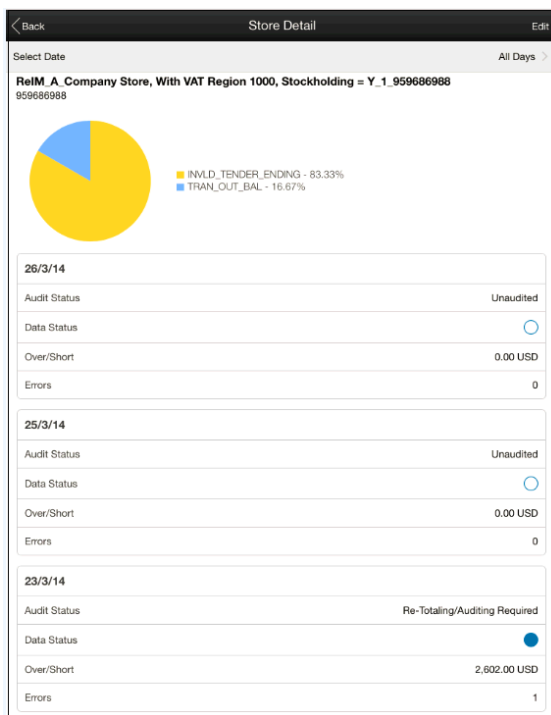
- [Viewing a Store Detail](#)
- [Editing a Store Detail](#)

Viewing a Store Detail

To view Store Details:

1. From the Store Search screen Assigned Stores or All Stores column, tap the **Arrow** icon. The **Store Detail** screen appears:

**Figure 2–34 Store Detail Screen**



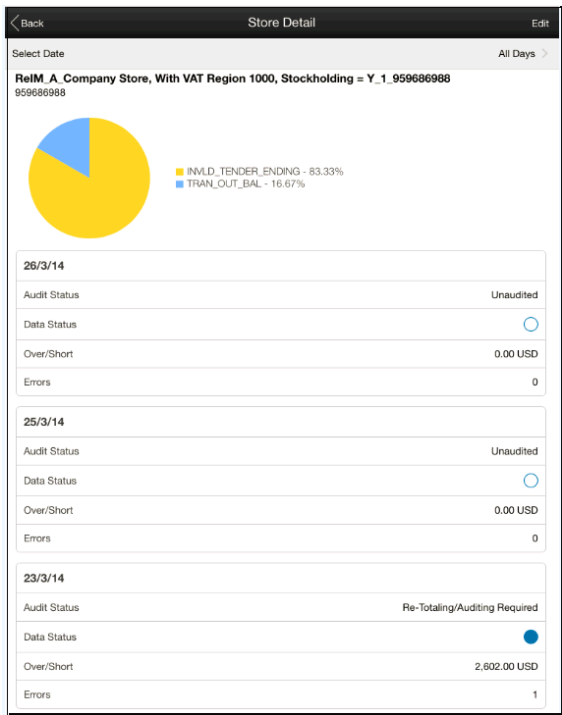
2. To return to the previous screen, tap **Back** or tap the **Back** icon. The Store Search screen appears. See [Figure 2–30](#).

## Editing a Store Detail

To Edit a Store Detail:

1. From the Store Detail screen, tap **Edit**. A selection circle appears next to each store and an action menu displays at the bottom of the screen.

Figure 2–35 Store Detail Edit Screen



- 2. To return to the previous screen, tap **Back** or tap the **Back** icon. The Store Search screen appears. See [Figure 2–30](#).

# Part III

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## Oracle Retail Allocation

This Mobile Merchandising User Guide is for users and administrators of Oracle Retail Allocation. This includes merchandisers, buyers, business analysts, and administrative personnel.

Part III contains the following chapter:

- [Using Oracle Retail Mobile Merchandising Allocation](#)



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## Using Oracle Retail Mobile Merchandising Allocation

Allocation mobile consists of Criteria Selection.

The following topics are covered in this chapter:

- [Criteria Selection](#)
- [Recent Allocations](#)
- [Processing Allocations](#)

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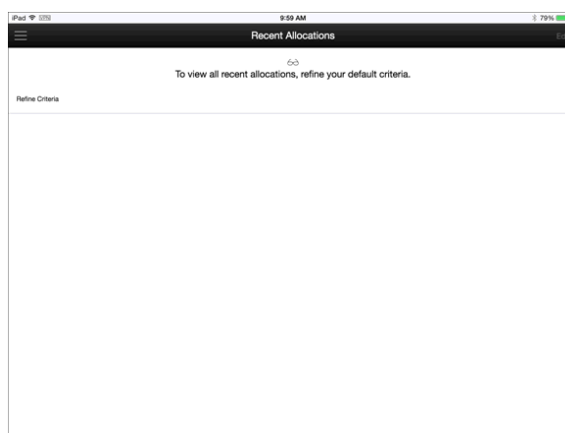
**Note:** The toolbar buttons enables you to work with Mobile Merchandising applications. For information on the navigation toolbar, see [Navigation Tools](#) section in [Mobile Merchandising Overview](#) chapter.

---

### Criteria Selection

After logging into the application for the first time you will need to refine your default criteria to view all recent allocations.

**Figure 3–1** *Initial Recent Allocations Screen*



### Viewing Criteria

To view criteria:

1. Tap **Refine Criteria** or the Right-Facing arrow. The Criteria screen appears.

---

**Note:** If you have used the application before you can skip to the next section, [Recent Allocations](#).

---

**Figure 3–2 Criteria Screen**

The screenshot shows the 'Criteria' screen with a dark header bar containing '< Apply', 'Criteria', and 'Cancel'. Below the header, a section titled 'Criteria Applied: 1' includes a 'Reset' button. The main area contains five filter rows: 'Allocation ID' with a text input field, 'Allocation Status' with 'Any Allocation Status >', 'Status' with 'Any Status >', 'Created By' with 'Allocator', and 'Created Date' with 'Any Date >'. A large empty white box is at the bottom.

2. From the Criteria section, tap **Allocation ID**. The onscreen keyboard appears. Type either part or all of the allocation ID number. If a partial allocation ID is input, the screen will show all IDs that are a match for the text entered.

Examples include:

- 500010
- 105000
- 150001

**Figure 3–3 Allocation ID Criteria**

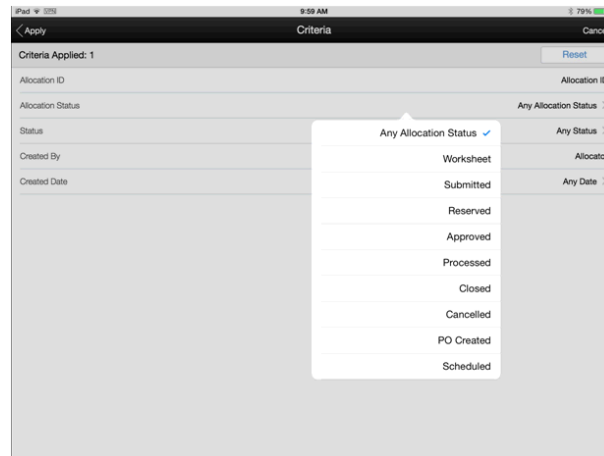
This screenshot shows the 'Criteria' screen with the 'Allocation ID' field selected, indicated by a red box around the text '5000'. The 'Criteria Applied: 2' section now includes both 'Allocation ID' and 'Allocation Status'. An onscreen keyboard is visible at the bottom of the screen.

3. Tap the **Keyboard** key to return to the list of **Criteria** selection screen.

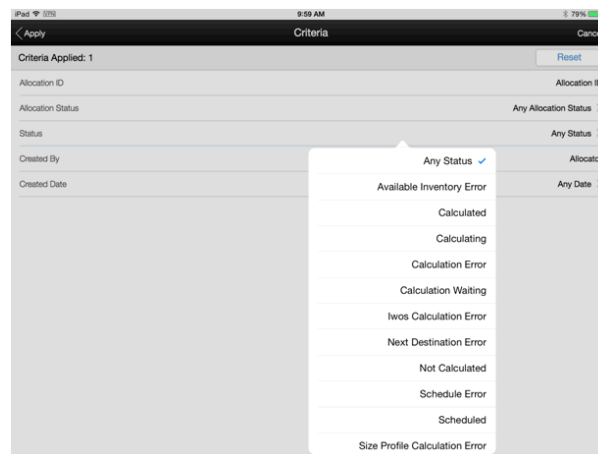


4. From the Criteria section, tap **Any Allocation Status**. A pop-up list of available choices appears.

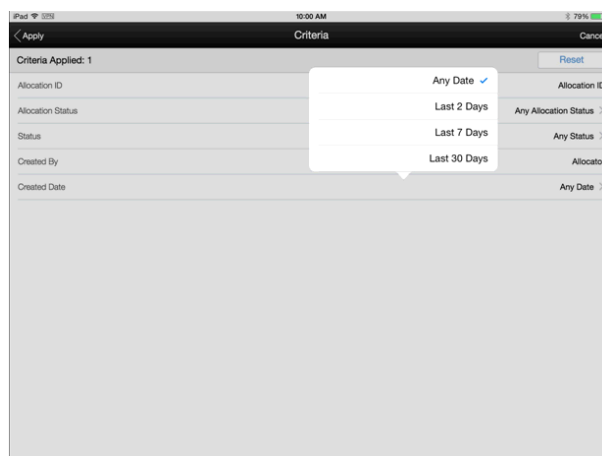
**Figure 3–4 Allocation Status**



5. Tap the desired Allocation Status. Choices include:
  - **Any Allocation Status**
  - **Worksheet** - The allocation is in the initial stages of creation or being updated by the user.
  - **Submitted** - The allocation has been submitted successfully.
  - **Reserved** - The items on the allocation are reserved in the warehouse and committed to the stores. The allocation will not be executed until the status is changed to Approved.
  - **Approved** - The items on the allocation are reserved in the warehouse and committed to the stores. This allocation will be executed on the release date.
  - **Processed** - The warehouse system has started executing this allocation. The allocation cannot be updated.
  - **Closed** - The allocation has been executed and reconciled. It cannot be edited.
  - **Cancelled** - The allocation has been cancelled.
  - **PO Created** - The allocation has been sent to the merchandising system, and a PO is generated.
  - **Scheduled** - The allocation will run when the configured conditions are met.
6. From the Criteria section, tap **Any Status**. A pop-up list of available choices appears.

**Figure 3–5 Status**

7. Tap the desired Status (Process Status). Choices include:
  - **Any Status**
  - **Available Inventory Error** - This error occurs if the inventory quantities that the allocation was based upon have been modified by another part of the system since the time of calculation. You must recalculate and approve based on the current inventory.
  - **Calculated** - The allocation has been calculated successfully.
  - **Calculating** - The system is in the process of calculating this allocation. The user cannot access an allocation with this status.
  - **Calculation Error** - An error was encountered during calculation.
  - **Calculation Waiting** - The allocation is waiting to be processed by the algorithm. The user cannot access an allocation with this status.
  - **(Ideal Weeks of Supply) Iwos Calculation Error** - This error occurs if the allocation weeks of supply data are not sufficient for the algorithm to run the calculation.
  - **Not Calculated** - The allocation has not been calculated.
  - **Schedule Error** - This error occurs if one or more problems occurred when the scheduled allocation was created.
  - **Scheduled** - The scheduled allocation has been created successfully.
  - **Size Profile Calculation Error** - The size profile was not found for all parent/diff combinations on the allocation. You must adjust your size profiles and recalculate the allocation.
8. From the Criteria section, tap **Allocation**. The onscreen keyboard appears. Type the **Allocator Name**. The allocator name must be an exact match. Entering **All Users** displays all Allocator Names.
9. From the Criteria section, tap **Created Date**. A pop-up list of available choices appears.

**Figure 3–6 Created Date**

10. Tap the desired Created Date. The options include:
  - Any Date
  - Last 2 Days
  - Last 7 Days
  - Last 30 Days
11. Once the criteria has been selected choices include:
  - Tap **Apply** to see the filtered results
  - Tap **Cancel** to return to the Recent Allocations Screen
  - Tap the **Reset** button to clear all selected criteria

## Recent Allocations

The Recent Allocations screen displays a list of allocations ready for viewing. Tapping on a specific line will display the Allocation Detail screen for that allocation.

**Figure 3–7 Recent Allocations**

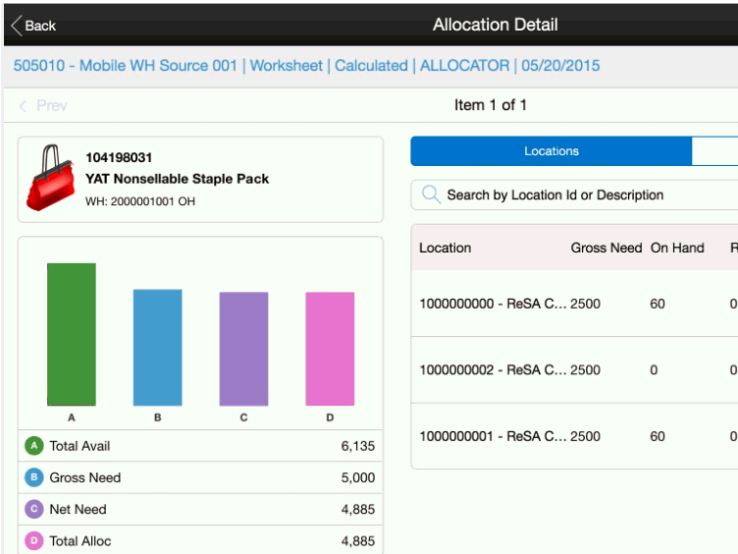
Allocation	Allocation Status	Status	Created By	Created On
505010 Mobile WH Source 001	Approved	Status Processed	ALLOCATOR	06/08/2015
505011 Mobile FPG WH Source 001	Worksheet	Not Calculated	ALLOCATOR	06/08/2015
505001 Mobile Nonresellable	Worksheet	Not Calculated	ALLOCATOR	06/02/2015
510002 Mobile BOL Source 001	Submitted	Calculated	ALLOCATOR	05/21/2015
510003 Mobile BOL Source 002	Approved	Status Processed	ALLOCATOR	05/21/2015
520002 Copy of Allocation 505012	Worksheet	Not Calculated	ALLOCATOR	05/21/2015
515002 Mobile BOL ASN Source 002	Worksheet	Not Calculated	ALLOCATOR	05/21/2015
525001 Copy of Allocation 520002	Worksheet	Not Calculated	ALLOCATOR	05/21/2015
525002 Copy of Allocation 520002	Worksheet	Not Calculated	ALLOCATOR	05/21/2015
520001 Copy of Allocation 505012	Worksheet	Not Calculated	ALLOCATOR	05/21/2015
515001 Mobile RPN ASN Source 001	Worksheet	Not Calculated	ALLOCATOR	05/21/2015

# Viewing Allocations

To view allocations:

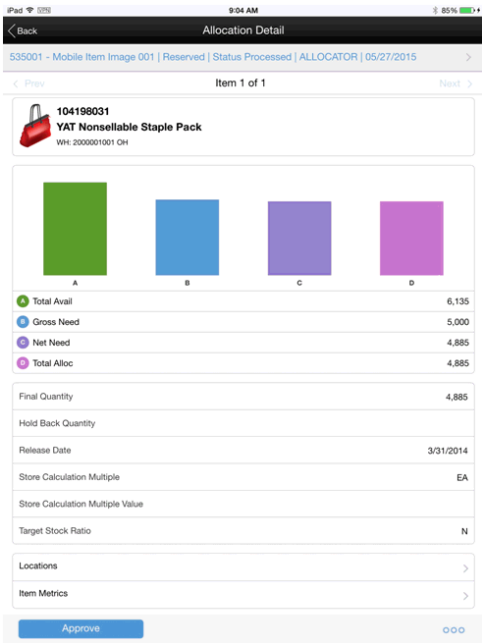
- 1. Tap the **Arrow** icon or anywhere within the line of the desired allocation. The Allocation Detail screen appears:

Figure 3–8 Allocation Detail Screen in Landscape View



- 2. Rotate the handheld device (Landscape: Normal or Portrait: Zoom) as required.

Figure 3–9 Portrait (zoom) Orientation Screen



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**Note:** In the **Portrait** orientation the information previously displayed on the right side of the Landscape orientation is accessible by tapping on **Locations** or **Item Metrics**.

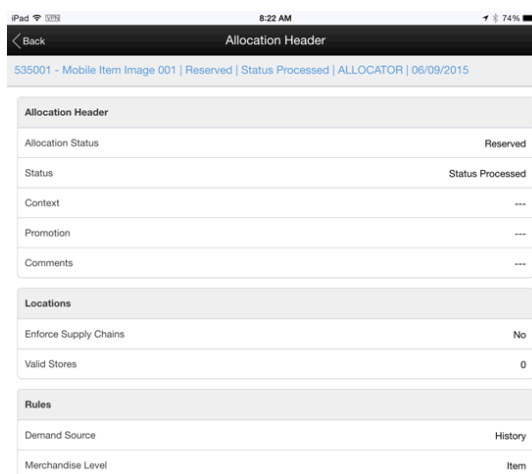
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## Viewing Allocation Header

To view allocation header:

1. To view the Allocation Header details tap anywhere in the light blue text area.

**Figure 3–10 Allocation Header Screen in Portrait View**



2. To return to the Allocation Detail screen, tap the **Back** icon.

The Allocation Header provides detailed information about the allocation. Details include:

### Allocation Header Area

- Allocation Status - The status of the allocation.
- Status (Process Status)
  - Not Calculated - The allocation has not been calculated.
  - Calculation Waiting - The allocation is waiting to be processed by the algorithm. You cannot access an allocation with this status.
  - Calculating - The system is in the process of calculating this allocation. The user cannot access an allocation with this status.
  - Calculated - The allocation has been calculated successfully.
  - Calculation Error - An error was encountered during calculation.
  - Size Profile Calculation Error - The size profile was not found for all parent/diff combinations on the allocation. Users must adjust their size profiles and recalculate the allocation.
  - (Ideal Weeks of Supply) Iwos Calculation Error - This error occurs if the allocation weeks of supply data are not sufficient for the algorithm requirements for calculation.

- Quantity Limits Conflict - This error occurs if quantity limits are defined for a pack and non-sellable pack containing the same item.
  - Status Error - The system encountered an error when submitting, reserving or approving this allocation.
  - Status Waiting - The system is in the process of submitting, reserving or approving this allocation.
  - Status Processing - The system is in the process of submitting, reserving or approving this allocation.
  - Status Processed - The allocation has been approved, reserved or submitted successfully.
  - Available Inventory Error - This error occurs if the inventory quantities that the allocation was based upon has increased or decreased by another part of the system since the time of calculation.
  - Item Source Conflict - This error occurs if an allocation is created using a purchase order in one allocation, and then a user attempts to create another allocation using an associated advance shipping notice (ASN).
  - Scheduled - The scheduled allocation has been created successfully.
  - Schedule Error - This error occurs if one or more errors occur when scheduled allocation was created.
- Context - The reason why the allocation is being created.
  - Promotion - When the Context ID is Promotion, this field is populated with the Promotion ID stored in a Pricing Management system.
  - Comments - User entered general information about this allocation.

### **Locations Area**

- Enforce Supply Chains - At least one store is not closed and has a valid Warehouse-Store relationship when the Enforce Supply Chains displays Yes.
- Valid Stores - List of the stores that are eligible for this allocation.

### **Rules Area**

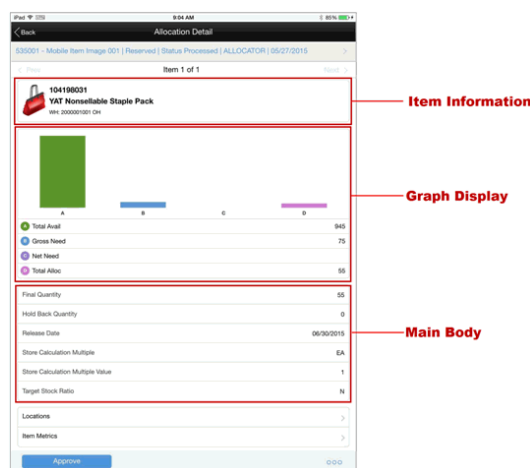
- Demand Source
  - History - Uses the item's historical sales for the date range selected to determine the gross need of item on the allocation.
  - Corporate Rules - Uses custom pre-defined rules to determine the need of the item on the allocation.
  - History and Plan - Uses both the item's sales history and plan for the date range selected to determine the gross need of the item on the allocation.
  - Forecast - Uses the item's forecast to determine what the store is forecasted to sell at the item/week level.
  - Plan - Uses an item/store/weekly sales plan for the date range selected to determine what the store is expected to sell.
  - Receipt Plan - Uses the item's receipt plan to determine what the store is expected to receive at the item/week level.

- Plan Re-project - Uses to compare the item's actual sales to the plan, re-forecast the plan based on performance for the date range selected, and use the re-projected plan to determine the gross need of the item on the allocation.
- Merchandise Level - The store demand is derived from the level of product hierarchy displayed.

## Allocation Details

The Allocation Detail screen provides the option to either approve or reject the allocation. Rotating the device displays a zoomed in view of each section of the Allocation Detail screen.

**Figure 3–11 Allocation Detail Screen in Portrait View**



## Screen Components

The Item Information area contains the following:

- Item Image
- Item
- Item Description
- Warehouse
- Document Type
- Document ID

The **Graph Display** area contains a chart representing the following metrics:

- A. Total Avail - The total number of units present in the set of sources selected for an item linked to the specific warehouse within an allocation.
- B. Gross Need - This is the total need for items at the select store based on the rule level specified for the allocation.
- C. Net Need - The Gross Need minus the On-Hand quantity.
- D. Total Alloc - Total allocated quantity for that item.

The **Main Body** area contains the following:

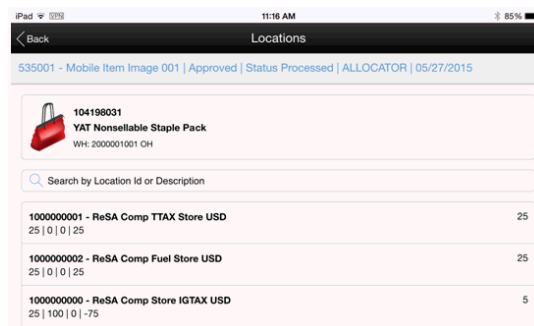
- Final Quantity - Same value as the Total Alloc quantity.

- **Hold Back Quantity** - A quantity of the item that remains unallocated.
- **Release Date** - The date the allocation is released.
- **Store Calculation Multiple** - The item multiple an allocation uses during the rounding process. Valid choices are: pallet, case, inner, or each.
- **Store Calculation Multiple Value** - The number of pallets, cases, inners, or eaches for that item.
- **Target Stock Ratio** - Applies in allocations involving the spread demand mode where the available quantity is less compared to the need value.

## Locations

The Locations detail view is accessed by tapping the **Arrow** icon or name in the portrait view.

**Figure 3–12** *Locations Screen in Portrait View*



## Filtering the Locations

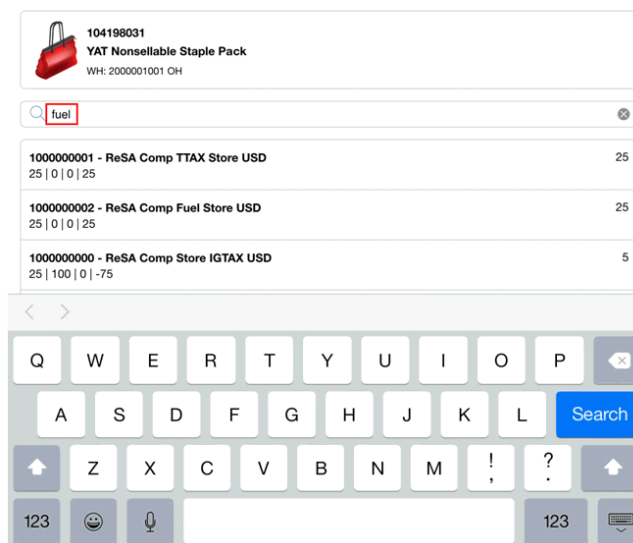
To filter locations:

1. Tap anywhere on the words: Search by Location Id or Description.
2. Enter any part of a location ID or item description. In the example below the word fuel is entered.

**Result:** Anything containing that word will appear in the list.

3. Click the **Search** button to filter the list based on the criteria entered in the Filter Bar.
4. To clear the filter, click **X** to remove the criteria and click **Search** to display the entire list.



**Figure 3–13 Filtering Search**

### Item Metrics

The Item Metrics detail view is accessed by tapping the **Arrow** icon or name in the portrait view.

**Figure 3–14 Item Metrics Screen in Portrait View**

The screenshot shows the 'Item Metrics' screen in portrait view. The header includes a 'Back' button and the title 'Item Metrics'. Below the header, there is a status bar with the text: '535001 - Mobile Item Image 001 | Reserved | Status Processed | ALLOCATOR | 05/27/2015'. The main content area displays a list of metrics for item 104198031, 'YAT Nonsellable Staple Pack', with WH: 2000001001 OH.

Metric	Value
Allocated Stores	1
Stores With 0 Qty	22
Highest Allocated Qty	683
Lowest Allocated Qty	36
Average Allocated Qty	293
Target Stock Ratio	N
Store Calculation Multiple	EA
Store Calculation Multiple Value	1

The Item Metrics contains the following information:

**Table 3–1 Item Metrics Screen**

Field	Description
Allocated Stores	Number of stores that are in the allocation for that item.
Stores with 0 Quantity	Number of stores in the allocation that will not receive that item.
Highest Allocation Qty	The highest value that any store received in the allocation for that item.
Lowest Allocated Qty	The lowest value that any store received in the allocation for that item.
Average Allocated Qty	The average quantity across all stores that received that item.

**Table 3–1 (Cont.) Item Metrics Screen**

Field	Description
Target Stock Ratio	Applies in allocations involving the spread demand mode where the available quantity is less compared to the need value.
Store Calculation Multiple	The item multiple an allocation uses during the rounding process. Valid choices are: pallet, case, inner, or each.
Store Calculation Multiple Value	The number of pallets, cases, inners, or eaches for that item.

## Processing Allocations

After an allocation is calculated, you can Submit, Reserve, or Approve the allocation in the Mobile Merchandising application.

1. Tap the desired allocation from the Recent Allocations screen.
  - Tap on a single Allocation, or
  - Click **Edit** and use the **Selection Circles** to select 1 or more allocations. After the initial selection, only compatible allocations in the same state are available for selection.
2. [Table 3–2](#) outlines the allocation approval workflow process.

**Table 3–2 Allocation Approval Workflow Process**

If the Allocation Status is....	And your Status is...	Click the available button...	Click Yes to change the Allocation Status to...
Worksheet	Calculated	Submit	Submitted
Submitted, Reserved, or Approved	Calculated or Status Processed	Withdraw	Worksheet
Worksheet, Submitted, Reserved, or Approved	Calculated	Approve	Approved
Worksheet or Submitted	Calculated	Reserve	Reserved

**Figure 3–15 Approved Allocation**

Allocation	Allocation Status	Status	Created By	Created On
Copy of Allocation 205004	Scheduled	Scheduled	allocator	05/20/2015
505015 Mobile PD WH Source 002	Submitted	Status Processed	ALLOCATOR	05/20/2015
510004 Copy of Allocation 205017	Worksheet	Not Calculated	ALLOCATOR	05/20/2015
505005 Copy of Allocation 205003	Scheduled	Scheduled	allocator	05/20/2015
505014 Mobile PD WH Source 001	Worksheet	Not Calculated	ALLOCATOR	05/20/2015
505002 Copy of Allocation 205001	Worksheet	Not Calculated	ALLOCATOR	05/20/2015
505010 Mobile WH Source 001	Approved	Status Processed	ALLOCATOR	05/20/2015
505011 Mobile PD WH Source 001	Worksheet	Not Calculated	ALLOCATOR	05/20/2015
505001 Mobile Nonreturnable	Worksheet	Not Calculated	ALLOCATOR	05/20/2015
510002 Mobile BDL Source 001	Submitted	Calculated	ALLOCATOR	05/20/2015
510003 Mobile BDL Source 002	Approved	Status Processed	ALLOCATOR	05/20/2015

3. To approve two or more applications, tap **Edit**.
4. Tap the selection option for each allocation you would like to approve. Notice in [Figure 3–16](#) after the first selection, the application automatically grays out allocations that are not eligible for approval. You may also withdraw previously approved allocations using this method. Once the selections are made, tap the **Approve** or **Withdraw** button and click **Yes** to complete the action.

**Figure 3–16 Multiple Approval/Withdrawal**

Allocation	Allocation Status	Status	Created By	Created On
515002 Mobile BDL ASN Source 002	Worksheet	Calculated	ALLOCATOR	05/21/2015
520001 Copy of Allocation 505012	Worksheet	Not Calculated	ALLOCATOR	05/21/2015
515003 Mobile WH PD Staple Pack 001	Worksheet	Calculated	ALLOCATOR	05/21/2015
505003 Copy of Allocation 205004	Scheduled	Scheduled	allocator	05/20/2015
505015 Mobile PD WH Source 002	Submitted	Status Processed	ALLOCATOR	05/20/2015
510004 Copy of Allocation 205017	Worksheet	Not Calculated	ALLOCATOR	05/20/2015
505005 Copy of Allocation 205003	Scheduled	Scheduled	allocator	05/20/2015
505014 Mobile PD WH Source 001	Worksheet	Not Calculated	ALLOCATOR	05/20/2015
505002 Copy of Allocation 205001	Worksheet	Not Calculated	ALLOCATOR	05/20/2015
505010 Mobile WH Source 001	Worksheet	Calculated	ALLOCATOR	05/20/2015

Approve Cancel

