

# **Oracle® Retail Mobile Merchandising**

User Guide

Release 16.0

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Oracle Retail Mobile Merchandising User Guide, Release 16.0

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

## Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 16.0) or a later patch release (for example, 16.0.1). 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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<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.

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



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## 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, and application security. 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 mobile devices, the application can be started.

## Signing Into the Application

To sign into the application:

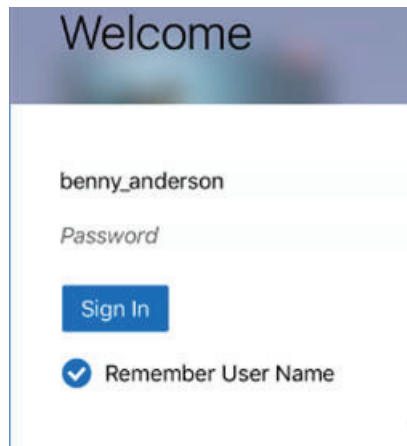
1. Access the handheld device.
2. Tap the Oracle Merchandising icon. The Welcome screen appears.

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

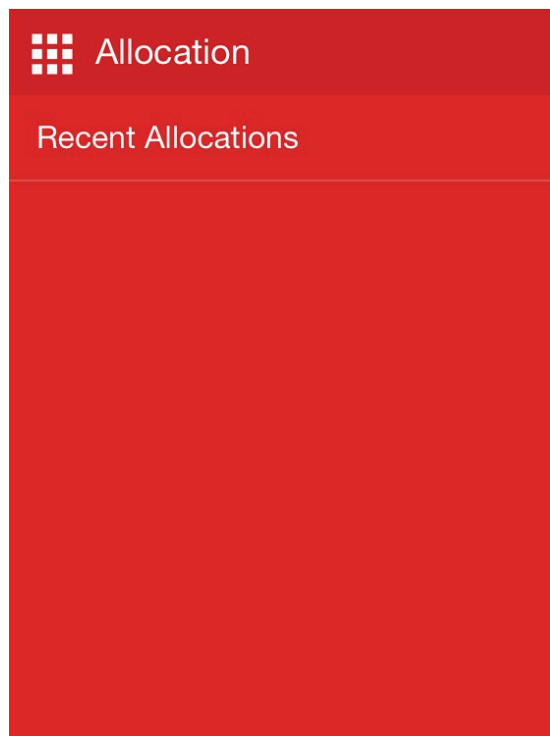
---

**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** if you wish the device 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.

**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*.

## 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 finger tap, button click or selecting on a HTML link by a stylus or pen-shaped apparatus, typically supplied with the mobile 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. The following sections describe these user interface controls in more detail:

The following topics are covered in this section:

- [Notifications](#)
- [Navigation Tools](#)
- [Message Types](#)

### Notifications

Notifications are user specific alert messages related to specific actions in RMS. Notifications are generated for the following actions and process completion:





- **Purchase Order Rejection** - This notification is raised anytime a purchase order in 'Submitted' status is set back to 'Worksheet' status, and where the current user (user reviewing the submitted POs) is not the same as the user that created the PO and is intended to notify the user that created the PO.
- **Transfer Rejection** - This notification is when a transfer is rejected by the approver and is intended to notify the user that created the transfer.

You can view number of notifications in the menu next to Notifications link. You can tap on the link to see the list of all notifications. The Notification Screen has a search feature which allows you to search for notification by description or type. Each notification can further be tapped to open the Notification Detail screen to see details about notifications. You can delete the notification also in the screen. There is a navigation link provided to open screens showing details such as Purchase Order Rejection. Also the hyperlink provided navigates to the Order Summary screen in Recent Orders.

### 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 Icon Descriptions**

Icon/Button	Description	Function
	Application Switcher	Tapping this menu displays a list of functional flows.
	Drawer	Tapping this icon displays the SMS or E-mail option that can be used to share the content of the screen
	View Selector	Tapping this icon in the ReSa application for example allows you to cycle through the four available Store Day Summary views in the Sales Audit functional flow
	Share	Tapping this icon displays the action choice for either SMS or E-mail.







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

Icon/Button	Description	Function
	Arrow	Tapping the arrow icon, more details can be viewed.
	Back	Tapping this button returns to the previous page.
	Search Reset	Tapping this icon clears the search criteria and allows you to perform a new search.
	Data Sorter	In some applications, tapping this icon sorts the data by relevant sorting option.
	Search	You can tap on this icon to specify the criteria to perform a search.
	Email	Tapping this icon enables you to send e-mails in certain applications.
	Text	Tapping this icon enables you to send text notifications in certain applications.

## Message Types

The table below lists the message types 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 is for users and administrators of Oracle Retail Sales Audit. This includes System Administrators, Customers, and 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 provides on the go access and information to Sales Audit Managers about the status of store day audits by their team of auditors. Providing at a glance data for the most delayed audits or those with the largest number of errors can focus a sales audit manager's attention where it is most needed. ReSA Mobile further aids managers by allowing easy methods of communication with their team members which automatically include selected content.

A Sales Audit Manager can use this application to view store days that have not passed the auditing process. With visibility to data status, over/short counts and values and error count. This information can be grouped by auditor giving managers visibility to their employees in most need of assistance in closing out their store days.

ReSA Mobile consists of a Store Day Summary dashboard and two separate mobile workflows, the Store Day Details workflow and the Store Search workflow. The dashboard displays automatically when the user enters 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 via the Store Day Summary dashboard and the Store Search workflow. The topics in this chapter describe how to select, view, search, edit, cancel, and e-mail in the ReSA Store Day Summary Dashboard.

The following topics are covered in this chapter:

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

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**Note:** The toolbar buttons enable you to work with Mobile Merchandising applications. For information on the navigation toolbar, see the [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

Application switcher displays all the applications installed at the retailer's or the ones user has access to.

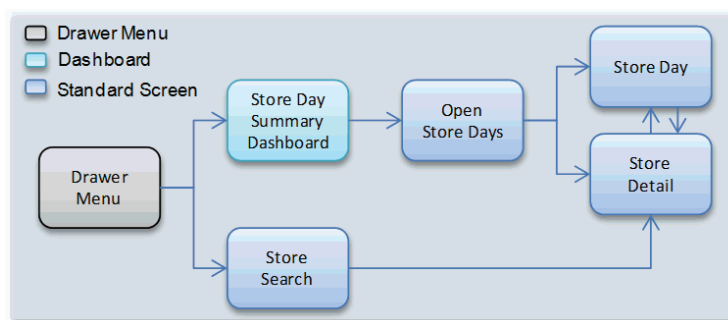
## Dashboard

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 Mobile 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

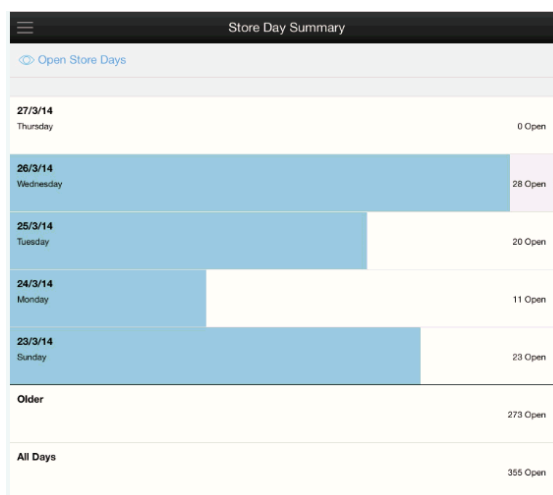
The Store Day Summary - Open Store Days view shows the number of open stores for which the sales audit manager is responsible. The stores for which you are responsible are those associated with you in ReSA's employee maintenance using location traits.

### 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**



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 Open Store Days](#)
- [Sharing Open Store Days](#)
- [Sending an E-mail](#)

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**

Store Day Summary						Share
Open Store Days		By Store		≡		
		Store	Auditor	Q/S	Errors	Data
4/11/16 Monday	0 Open >	12667 12667		0.00 USD	0	○ >
4/10/16 Sunday	988 Open >	23093593 - Forward Port Bug (Bharti Testing) 8086		0.00 AFN	0	○ >
4/9/16 Saturday	0 Open >	2nd Store 25932		0.00 USD	0	○ >
4/8/16 Friday	0 Open >	AMS, Franchise, Store 131313		0.00 USD	0	○ >
4/7/16 Thursday	0 Open >	AUTO REIM COMPANY STORE 77777		0.00 EUR	0	○ >
Older	11,601 Open >	Address CFAS test 142		0.00 USD	0	○ >
All Days	12,190 Open >	Alloy Demo Franchise 913		0.00 USD	0	○ >
		Alloy Demo Store 912	SYLVIA_GARCIA	0.00 USD	0	○ >
		Alloy Demo test Store				

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

Open Store Days		Edit
Select Date	Older >	
By Store	≡	Open Days
A's Comp Virtual Store		
333333		5 Open >
Auditor: RESA_AUDITOR		
A's Resa Store		
111111		15 Open >
Auditor: AUDITOR,RESA_ADMINISTRATOR		
A's Resa TTAX Store		
222222		18 Open >
Auditor: AUDITOR,AUDITOR_MANAGER		
ALLOC_QA_Store_2_255424290		
255424290		29 Open >
Auditor: AUDITOR_MANAGERFINANCE_MANAGER		
ALLOC_QA_Store_4_Franchise_555742180		
555742180		31 Open >
Auditor: AUDITOR_MANAGERFINANCE_MANAGER		
Long store name ABCDEFGHIJKLMNOPQRSTUVWXYZ		
222222222		18 Open >
Auditor: RESA_AUDITOR		
ReIM_A_Company Store, With VAT Region 1000, Stockholding = Y_1_959686988		
959686988		30 Open >
Auditor: AUDITOR_MANAGERFINANCE_MANAGER		
ReIM_A_Franchise Store, With VAT Region 1000, Stockholding = Y_2_533842923		
533842923		29 Open >
Auditor: RESA_AUDITOR		
ReSA Comp Fuel Store USD		
100000002		9 Open >
Auditor: RESA_AUDITOR		
ReSA Comp Non STK USD		
100000003		9 Open >
Auditor: RESA_AUDITOR		

Figure 2–8 Viewing Open Store Days for All Days

Open Store Days		
Back		Edit
Select Date		All Days >
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 Open Store Days

To view open store days:

- 1. From any view, tap the **Arrow** icon. The Open Store Days window appears.

Figure 2–9 Open Store Days Screen

Store Day Summary				
Open Store Days	By Store			≡
	Store	Auditor	O/S	Errors
4/11/16 Monday	12667		0:00 USD	0
4/10/16 Sunday	23063593 - Forward Port Bug (Bharti Testing)		0:00 AFN	0
4/9/16 Saturday	2nd Store		0:00 USD	0
4/8/16 Friday	AMS_Franchise_Store		0:00 USD	0
4/7/16 Thursday	AUTO REIM COMPANY STORE		0:00 EUR	0
Older	Address CFAS test		0:00 USD	0
All Days	Alloy Demo Franchise		0:00 USD	0
	Alloy Demo Store	SYDRA_SAPDIA	0:00 USD	0
	All New Inventory Item Store			

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

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**Note:** The Open Store Days screen can be sorted in various ways, including, by Store, by Auditor, and by Metric.

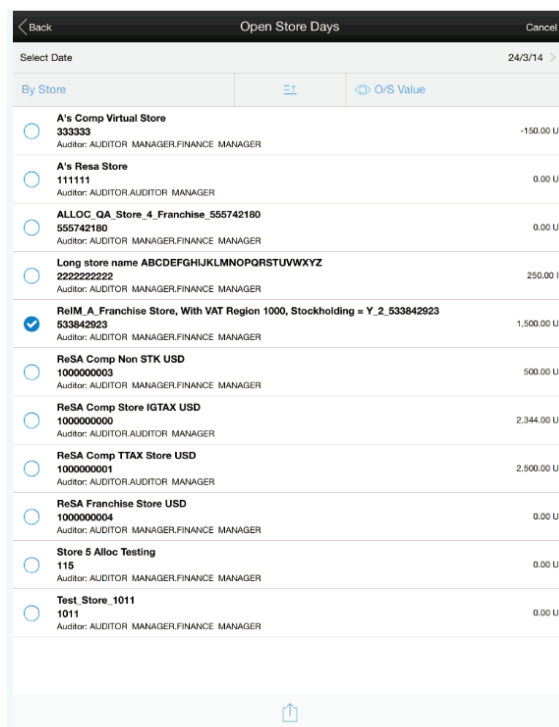
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## Sharing Open Store Days

To share open store days:

1. From the Open Store Days screen, tap **Edit**. The selection circles appear 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 e-mail to the auditors assigned to the selected stores. For information on e-mail, see [Sending an E-mail](#) section.

## Sending an E-mail

To send an e-mail:

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

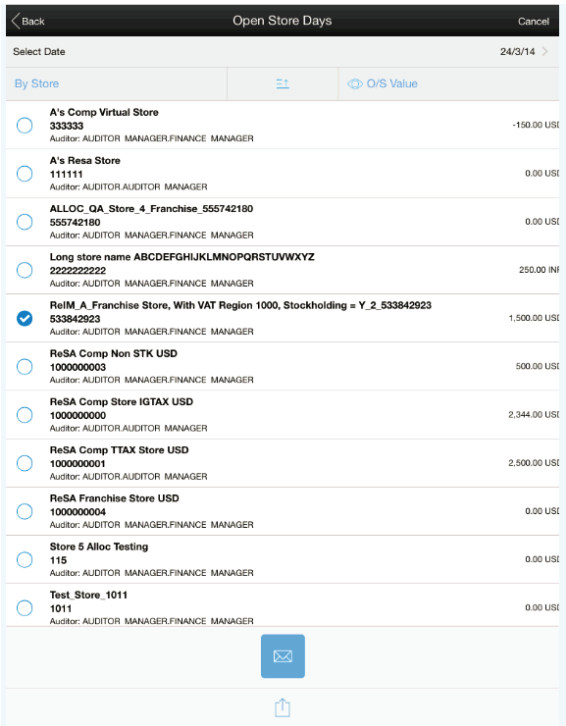
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**Note:** At any time the Cancel button will remove all selections.

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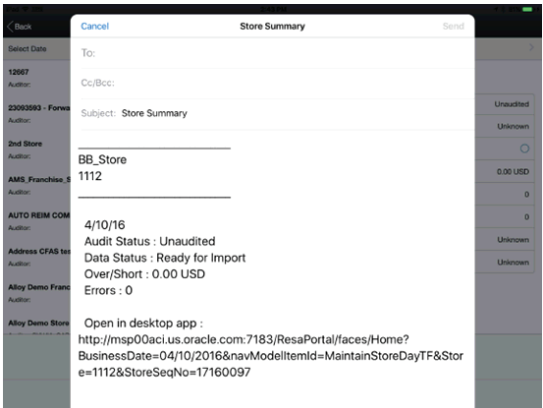
3. Tap the **Share** icon. The **Email** icon appears at the bottom of the screen.

Figure 2–11 Sending an Email



4. Tap the Email icon. The e-mail generated appears in the mobile e-mail client on the device screen.

Figure 2–12 Email Generated in the Mobile Email Client on the Device Screen



5. The subject of the e-mail is displayed. This field is system generated and user editable. The following details are displayed:
- Store/Business date

- Store Name
  - Store ID
  - Chain Name
  - O/S Value
  - Errors
  - Message containing Open in desktop app followed by a hyperlink/URL
6. You can add additional comments prior to sending the e-mail.

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**Note:** Copying and pasting the URL included in the e-mail 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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## 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.

### 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 store days for the selected date, the no data to display message appears.

### 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.

## 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 store days 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:

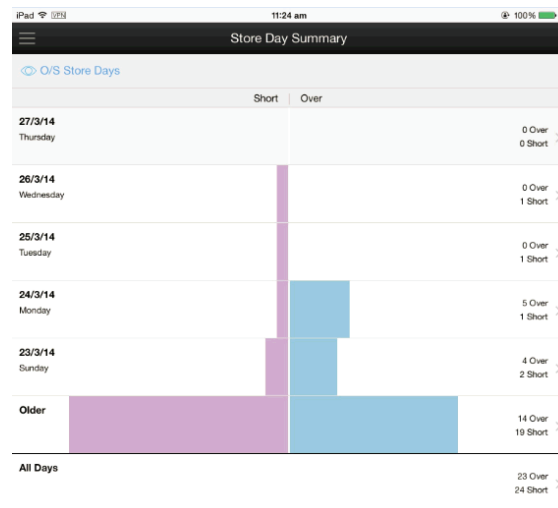
- [Viewing a Store Day Summary - Over/Short Store Days](#)

### 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 2–13 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 shortage/overage.
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 open store days with overages and the count of open store days with shortages. Only the stores to which you are assigned are shown here.
  - 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.

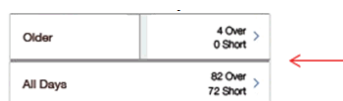
- This view displays Over Short Store days, basically the number of stores which have either over or short totals for that date.
5. The Older label displays the counts of overages and shortages of stores prior to the first five dates. If no overages or shortages are found, the section will still display with a count of 0 Over, or 0 Short.

**Figure 2–14 Section displaying with a count of 4 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 2–15 An example of a visual separator between sections**



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

**Figure 2–16 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.

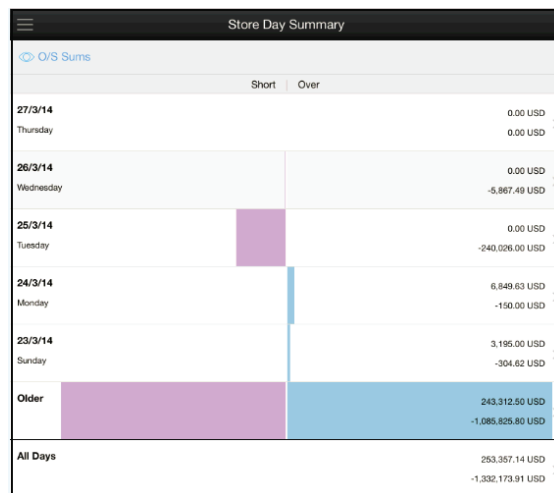
This section contains the following topic to help you understand and manage over/short sums:

- [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.

**Figure 2–17 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 overage/shortage.
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 hand section contains the sum of the over and shortages, together with their values in the local or retailer's default 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 the local or the 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.
5. The Older section 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 2–18 Section displaying the sums of overages and shortages of open stores prior to the first five dates**

Older	120.00 USD - 55.24 USD >
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6. 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 separator is between the Older and the All Days section.

**Figure 2–19 Visual separator between the sections containing the graphical visual of the bars and the sections that are not a part of the graph**

Older	120.00 USD - 55.24 USD >
All Days	120.00 USD - 55.24 USD >

7. 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 2–20 All Days Label Section**

All Days	120.00 USD - 55.24 USD >
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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 - Error Count

The Store Day Summary - Error Count view shows 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.

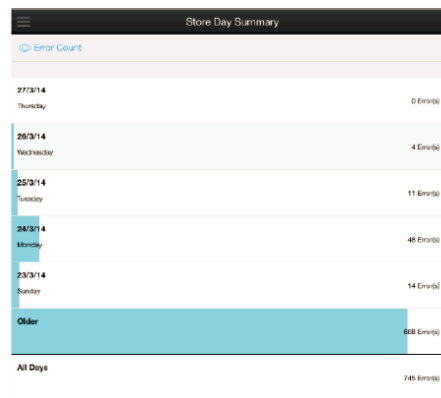
This section contains the following topic to help you understand and manage the error count:

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

### Viewing a Store Day Summary - Error Count

To view the Store Day Summary - Error Count:

1. From the Store Day Summary - Open Store Days, tap the **View Selector** icon.

**Figure 2–21 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 the 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 section displays the counts of outstanding errors for store days which you are assigned prior to the first five dates.

**Figure 2–22 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 separator is between the Older and the All Days section.

**Figure 2–23 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 2–24 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.

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

- [Viewing a Store Day](#)
- Select Date
- [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 in any section. The Open Store Days screen appears. See [Figure 2–9](#).
3. From the Open Store Days screen, tap the **Arrow** icon of any store. The Store Day screen appears.





**Figure 2–25 Store Day Screen**

ReSA Comp Store IGTAX USD	
Audit Status	Re-Totalling/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 2–1 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 an auditor can work or not.  For information on data statuses, see <a href="#">Table 2–2</a> .
Over/Short	This field is system generated and user editable.
Errors	It contains the number of outstanding errors for the store day. Errors are considered outstanding when they exist against the store day and have not been overridden.
Transactions	It contains the number of transactions that exist for the store day.
Files Loaded	It contains the number of files that have been loaded for the store day.
Files Expected	It contains the number of files the system expects to load for the store day.

**Table 2–2 Data Status**

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

## Using the Date Selector

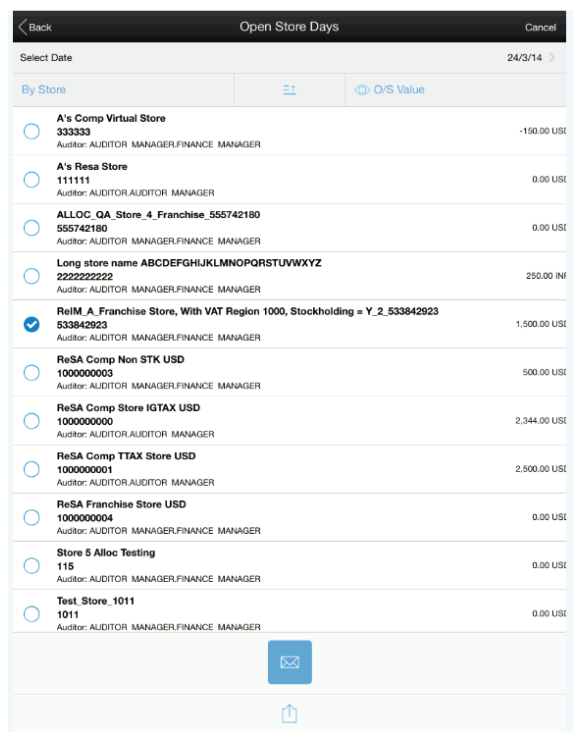
The Date Selector bar allows you to select the date for which the store day details are displayed. There are seven choices in this drop-down list. The previous five days as listed in the dashboard (today minus 1 through today minus 5), Older, and All Days. By default the date selector will display the day that was selected in the Open Store Days screen. Only dates for which there are open stores are enabled in the date selector. If there are no open stores for the 'Older' dates, the 'Older' option is disabled. All Days will always be enabled because you cannot navigate to this screen without at least one open store. When you select 'Older' or 'All Days', the Store Detail screen will display showing all of the applicable dates for the same store.

## Sending an Email

To send an e-mail:

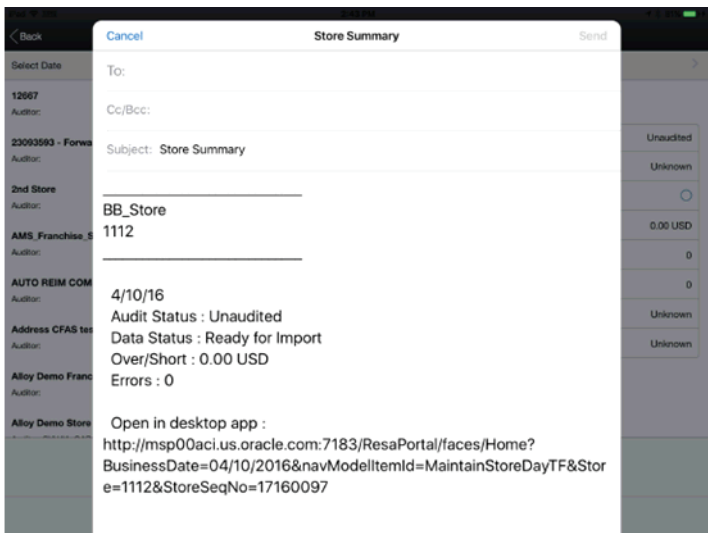
1. From the Store Day Summary - Open Store Days screen, tap the **Arrow** icon. The Open Store Days screen appears. See [Figure 2–9](#).
2. From the Open Store Days screen, tap **Edit**. The selection circles appears next to each store and an action menu displays at the bottom of the screen. See [Figure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

Figure 2–26 Sending an Email



- 5. Tap the **Email** icon. The e-mail generated appears in the mobile e-mail client on the device screen.

Figure 2–27 Email Generated in the Mobile Email Client on the Device Screen



- 6. The following details are displayed:
  - Store/business date
  - Store Name
  - Store ID
  - Chain Name

- O/S Value
  - Errors
  - Message containing Open in desktop app followed by a hyperlink/URL
7. You can add additional comments prior to sending the e-mail.

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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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8. To send an e-mail on a Store Day screen (Figure 2-25), repeat steps 4 and 5 to activate the e-mail screen

## 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:

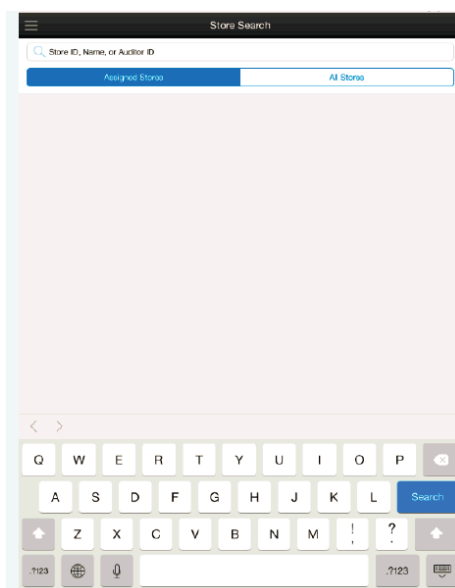
- [Searching for a Store](#)
- [Viewing Store Search Results](#)

### Searching for a Store

To Search for a Store:

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

**Figure 2–28 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.

---

**Note:** You must enter one character or more 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 or only those 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 2–29](#) and [Figure 2–30](#) for searches based on Assigned Stores and searches based on All Stores.

**Figure 2–29 Search based on Assigned Stores**

The screenshot shows the 'Store Search' interface with a search bar containing '100'. Below the search bar, there are two tabs: 'Assigned Stores' (selected) and 'All Stores'. Below the tabs, there are three filters: 'By Store', 'Open Days', and 'Open Days'. The search results are displayed in a table with the following columns: Store Name, Stockholding, Auditor, and Status. The results are as follows:

Store Name	Stockholding	Auditor	Status
ReIM_A Company Store, With VAT Region 1000, Stockholding = Y_1_959686988	959686988	AUDITOR MANAGER.FINANCE MANAGER	33 Open
ReIM_A Franchise Store, With VAT Region 1000, Stockholding = Y_2_533842923	533842923	AUDITOR MANAGER.FINANCE MANAGER	33 Open
ReSA Comp Fuel Store USD	1000000002	AUDITOR MANAGER.FINANCE MANAGER	12 Open
ReSA Comp Non STK USD	1000000003	AUDITOR MANAGER.FINANCE MANAGER	13 Open
ReSA Comp Store IG TAX USD	1000000000	AUDITOR.AUDITOR MANAGER	13 Open
ReSA Comp TTAX Store USD	1000000001	AUDITOR.AUDITOR MANAGER	12 Open
ReSA Franchise Store USD	1000000004	AUDITOR MANAGER.FINANCE MANAGER	13 Open

**Figure 2–30 Search based on All Stores**

The screenshot shows the 'Store Search' interface with a search bar containing '100'. Below the search bar, there are two tabs: 'Assigned Stores' and 'All Stores' (selected). Below the tabs, there are three filters: 'By Store', 'Open Days', and 'O/S Days'. The search results are displayed in a table with the following columns: Store Name, Stockholding, Auditor, and Status. The results are as follows:

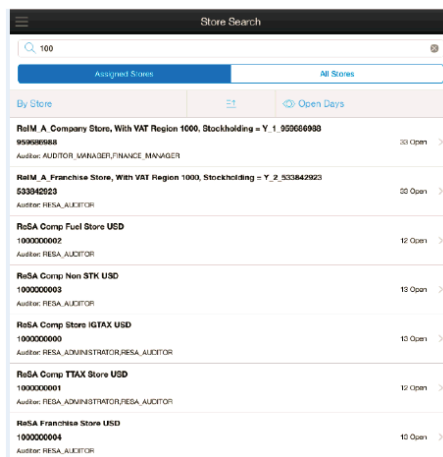
Store Name	Stockholding	Auditor	Status
ReIM_A Company Store, With VAT Region 1000, Stockholding = Y_1_959686988	959686988	AUDITOR MANAGER.FINANCE MANAGER	5 Over 10 Short
ReIM_A Franchise Store, With VAT Region 1000, Stockholding = Y_2_533842923	533842923	AUDITOR MANAGER.FINANCE MANAGER	4 Over 0 Short
ReSA Comp Fuel Store USD	1000000002	AUDITOR MANAGER.FINANCE MANAGER	0 Over 0 Short
ReSA Comp Non STK USD	1000000003	AUDITOR MANAGER.FINANCE MANAGER	12 Over 0 Short
ReSA Comp Store IG TAX USD	1000000000	AUDITOR.AUDITOR MANAGER	18 Over 12 Short
ReSA Comp TTAX Store USD	1000000001	AUDITOR.AUDITOR MANAGER	30 Over 6 Short
ReSA Franchise Store USD	1000000004	AUDITOR MANAGER.FINANCE MANAGER	8 Over 8 Short



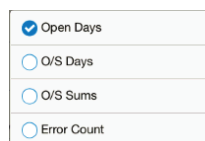
## Viewing Store Search Results

To view Store Search Results:

**Figure 2–31 Store Search Results Screen**



1. Tap the **Data Sorter** icon to sort the list of stores based on the selected sorting option. The three sorting options are By Store, By Auditor, and By Metric. Tapping the **Data Sorter** icon the second time reverses the sorted list.
2. 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:



- 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.
3. 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 all the open store days for the particular store.

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

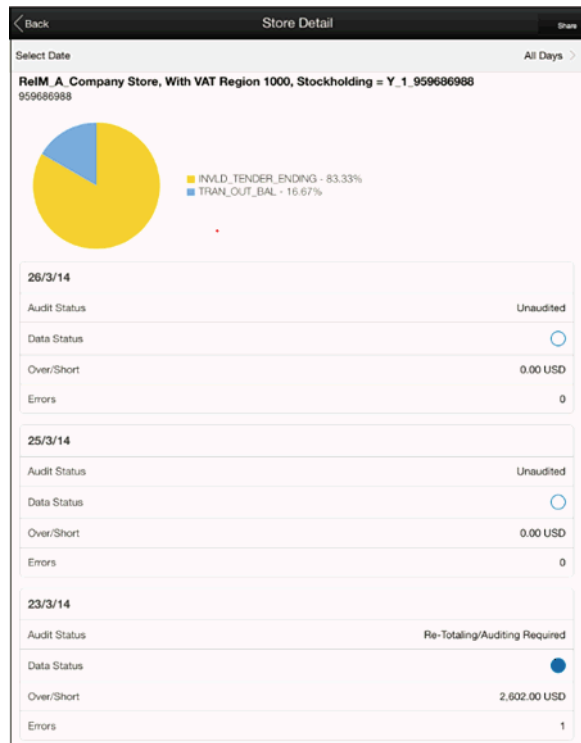
- [Viewing a Store Detail](#)
- [Sharing a Store Detail](#)

### Viewing a Store Detail

To view Store Details:

1. From the Store Search window, tap the **Arrow** icon for any store in the search result section. The **Store Detail** screen appears:

**Figure 2–32 Store Detail Screen**



2. To return to the previous screen, tap **Back** or tap the **Back** icon. The Store Search screen appears. See [Figure 2–28](#).

## Sharing a Store Detail

To share a Store Detail:

1. From the Store Detail screen, tap **Share**. A selection circle appears next to each store day and an action menu displays at the bottom of the screen. Tap the desired entries and then tap the Action icon to access the e-mail icon.
2. To return to the previous screen, tap **Back** or tap the **Back** icon. The Store Search screen appears. See [Figure 2–28](#).

# Part III

---

## 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](#)



---

## Using Oracle Retail Mobile Merchandising Allocation

Allocation Oracle Retail Mobile Merchandise application for Allocation provides on-the-go visibility into allocations created in the desktop version of the application.

The Allocation mobile application was designed for an Allocation Manager, and provides the ability to look up recently-created allocations, view details on these allocations, (such as metrics on the items included in the allocation), and approve and reserve the allocations.

These features are an extension to existing Allocation web application, and as such, actions taken in the web application update the allocations in the Allocation web application. Mobile consists of Criteria Selection.

The following topics are covered in this chapter:

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

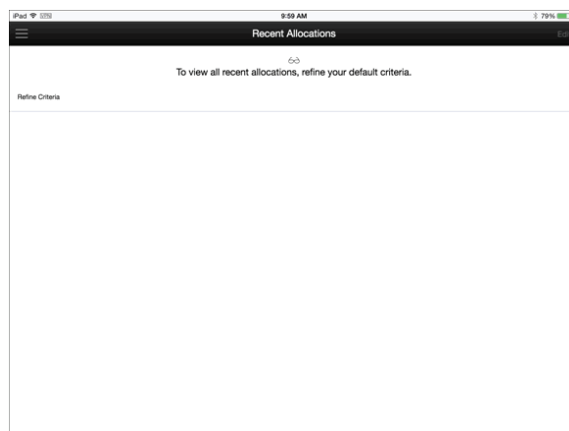
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**Note:** The toolbar buttons enable you to work with Mobile Merchandising applications. For information on the navigation toolbar, see the [Navigation Tools](#) section in the [Mobile Merchandising Overview](#) chapter.

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### 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

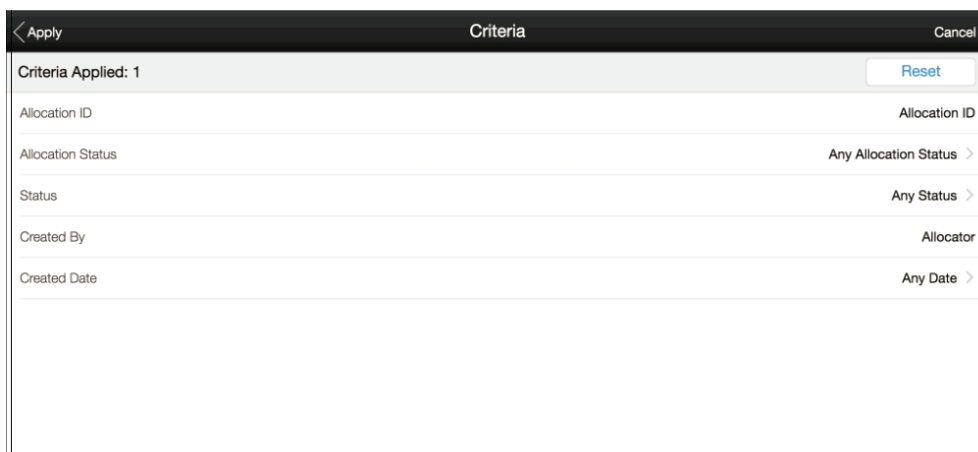
To view criteria:

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](#).

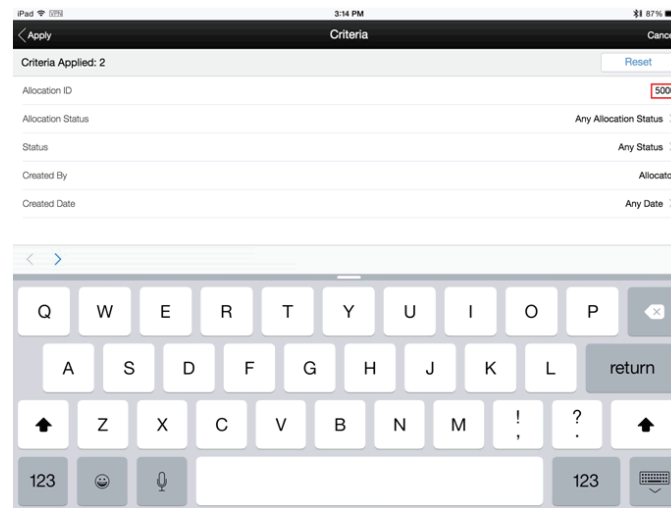
---

**Figure 3–2 Criteria Screen**

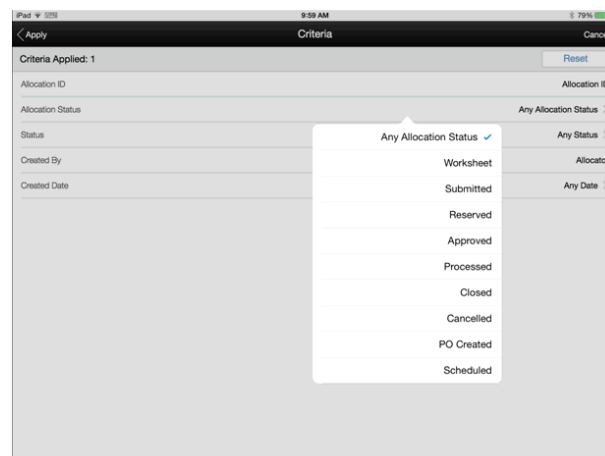
2. From the Criteria section, tap **Allocation ID**. The onscreen keyboard appears. Type either part or all of the allocation ID number. If a partial allocation ID is input, the screen will show all IDs that are a match for the text entered.

Examples include:

- 500010
- 105000
- 150001

**Figure 3–3 Allocation ID Criteria**

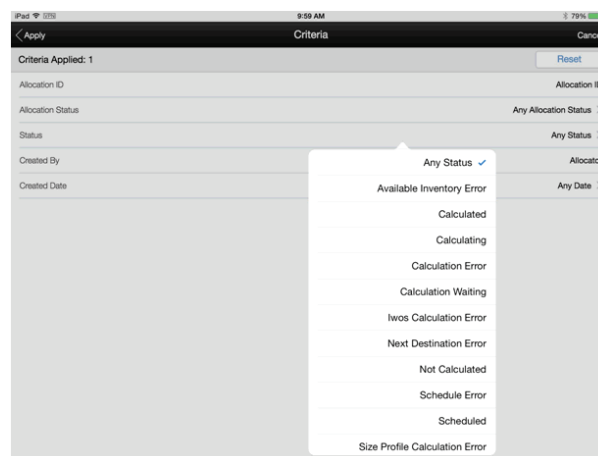
3. Tap the **Keyboard** key to return to the list of **Criteria** selection screen.
4. From the Criteria section, tap **Any Allocation Status**. A drop-down list of available choices appears.

**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 drop-down list of available choices appears.

**Figure 3–5 Status**

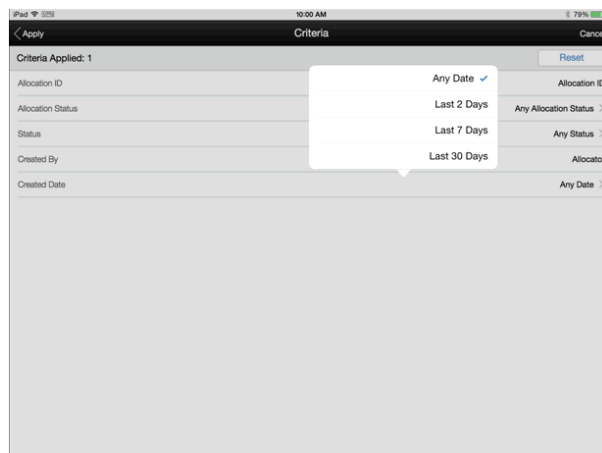


7. Tap the desired Status (Process Status). Choices include:
- **Any Status**
  - **Available Inventory Error** - This error occurs if the inventory quantities that the allocation was based upon have been modified by another part of the system since the time of calculation. You must recalculate and approve 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 drop-down list of available choices appears.

**Figure 3–6 Created Date**



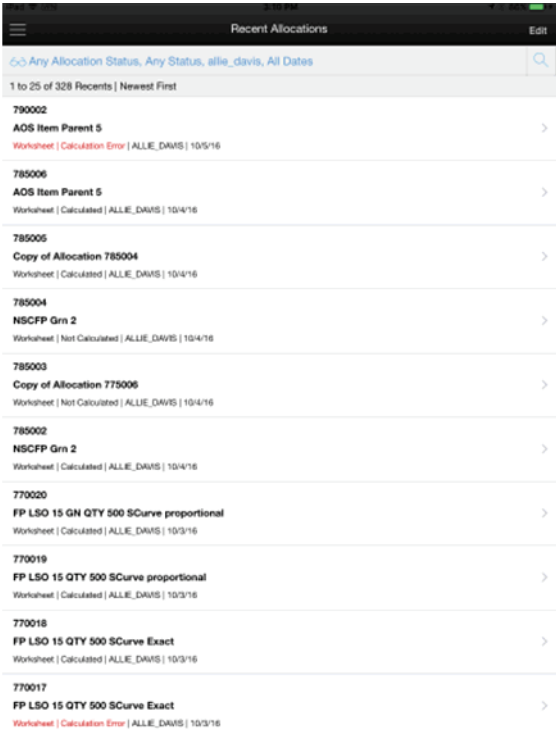
10. Tap the desired Created Date. The options include:
  - Any Date
  - Last 2 Days
  - Last 7 Days
  - Last 30 Days
11. Once the criteria has been selected choices include:
  - Tap **Apply** to see the filtered results
  - Tap **Cancel** to return to the Recent Allocations Screen
  - Tap the **Reset**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

- Allocation ID with Description
- Allocation Status
- Status
- Created By
- Created Date

Figure 3–7 Recent Allocations

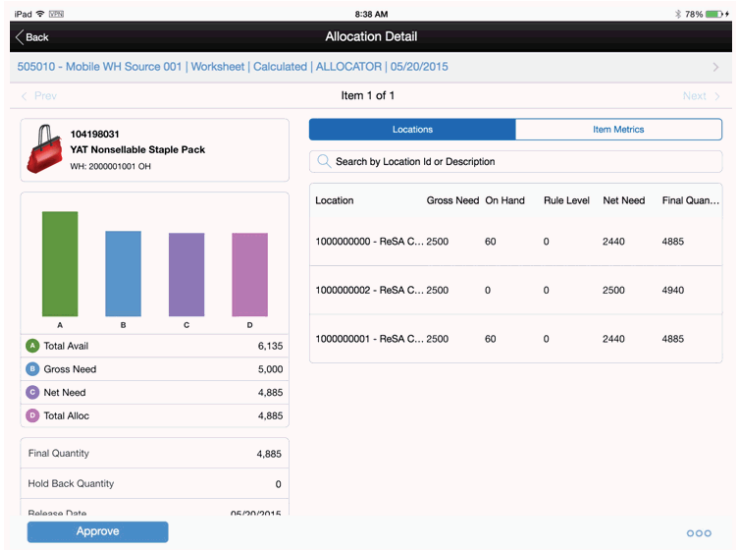


Viewing Allocations

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**

Allocation Detail

535001 - Mobile Item Image 001 | Reserved | Status Processed | ALLOCATOR | 05/27/2015

Item 1 of 1

104198031  
YAT Nonsellable Staple Pack  
VIN: 2000021001 OH

A B C D

Total Avail	6,135
Gross Need	5,000
Net Need	4,885
Total Alloc	4,885

Final Quantity	4,885
Hold Back Quantity	
Release Date	3/31/2014
Store Calculation Multiple	EA
Store Calculation Multiple Value	
Target Stock Ratio	N

Locations >

Item Metrics >

Approve

**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**.

## Viewing Allocation Header

To view allocation header:

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

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

Allocation Header

535001 - Mobile Item Image 001 | Reserved | Status Processed | ALLOCATOR | 06/09/2015

Allocation Status	Reserved
Status	Status Processed
Context	---
Promotion	---
Comments	---

Enforce Supply Chains	No
Valid Stores	0

Demand Source	History
Merchandise Level	Item

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 were 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 the 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 - Number of stores that are eligible for this allocation.

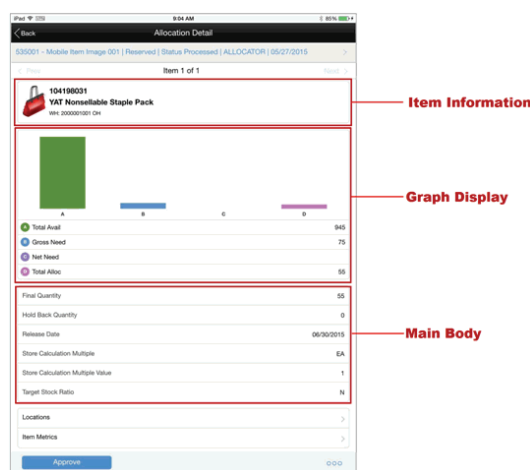
## Rules Area

- Demand Source
  - History - Uses the item's historical sales for the date range selected to determine the gross need of the 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 - Compares the item's actual sales to the plan, re-forecast the plan based on performance for the date range selected, and then uses the re-projected plan to determine the gross need of the item on the allocation.
- Merchandise Level - This shows the level of product hierarchy. The store demand is derived from the level of product hierarchy displayed.

## Allocation Detail

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.

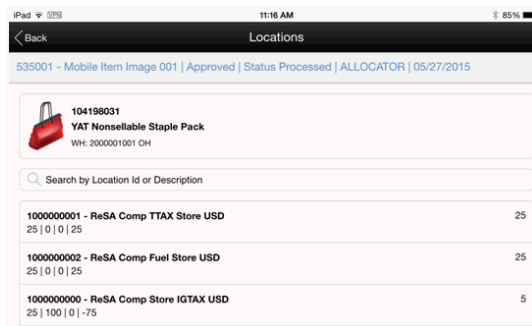
The **Main Body** area contains the following:

- 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 anywhere in the Locations row in the portrait view.

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



## Filtering the Locations

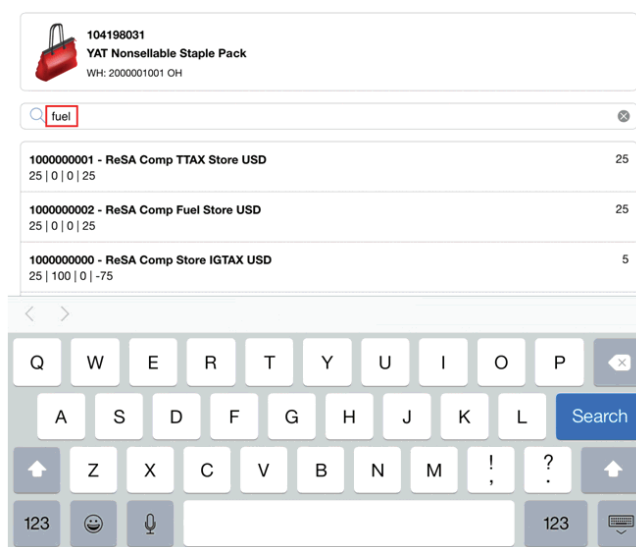
To filter locations:

1. Tap anywhere in the filter bar: 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:** Any location containing part of location ID or description specified as search criteria will appear in the search results.

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.

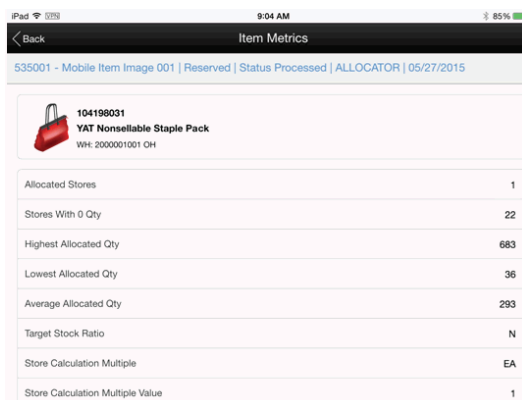
**Figure 3–13 Filtering Search**



## Item Metrics

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

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



The Item Metrics window 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.
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. The table below outlines the allocation approval workflow process.

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

If the Allocation Status is....	Processing 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 Changing Allocation Status**

Allocation	Allocation Status	Status	Created By	Created On
505015 Mobile PO 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 PO WH Source 001	Worksheet	Not Calculated	ALLOCATOR	05/20/2015
505002 Copy of Allocation 300001	Worksheet	Not Calculated	ALLOCATOR	05/20/2015
505010 Mobile WH Source 001	Approved	Status Processed	ALLOCATOR	05/20/2015
505011 Mobile POC WH Source 001	Worksheet	Not Calculated	ALLOCATOR	05/20/2015
505001 Mobile Nonseparable	Worksheet	Not Calculated	ALLOCATOR	05/20/2015
510002 Mobile BOL Source 001	Submitted	Calculated	ALLOCATOR	05/20/2015
510003 Mobile BOL 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 the figure below 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 BOL ASN Source 002	Worksheet	Calculated	ALLOCATOR	05/21/2015
520001 Copy of Allocation 505012	Worksheet	Not Calculated	ALLOCATOR	05/21/2015
515003 Mobile WH PO Staple Pack 001	Worksheet	Calculated	ALLOCATOR	05/21/2015
505003 Copy of Allocation 205004	Scheduled	Scheduled	allocator	05/20/2015
505015 Mobile PO 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 PO WH Source 001	Worksheet	Not Calculated	ALLOCATOR	05/20/2015
505002 Copy of Allocation 300001	Worksheet	Not Calculated	ALLOCATOR	05/20/2015
505010 Mobile WH Source 001	Worksheet	Calculated	ALLOCATOR	05/20/2015

Approve Cancel



# Part IV

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## Oracle Retail Invoice Matching

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

Part III contains the following chapter:

- [Using Oracle Retail Mobile Merchandising Retail Invoice Matching](#)



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## Using Oracle Retail Mobile Merchandising Retail Invoice Matching

The Merchandising Mobile application Retail Invoice Matching is for users and administrators of Oracle Retail Invoice Matching. This includes finance managers and buyers. The primary role of this application is to prioritize work for matching invoices in ReIM, to provide finance managers visibility to employee workload and to also provide both finance managers and buyers a quick glance at supplier performance.

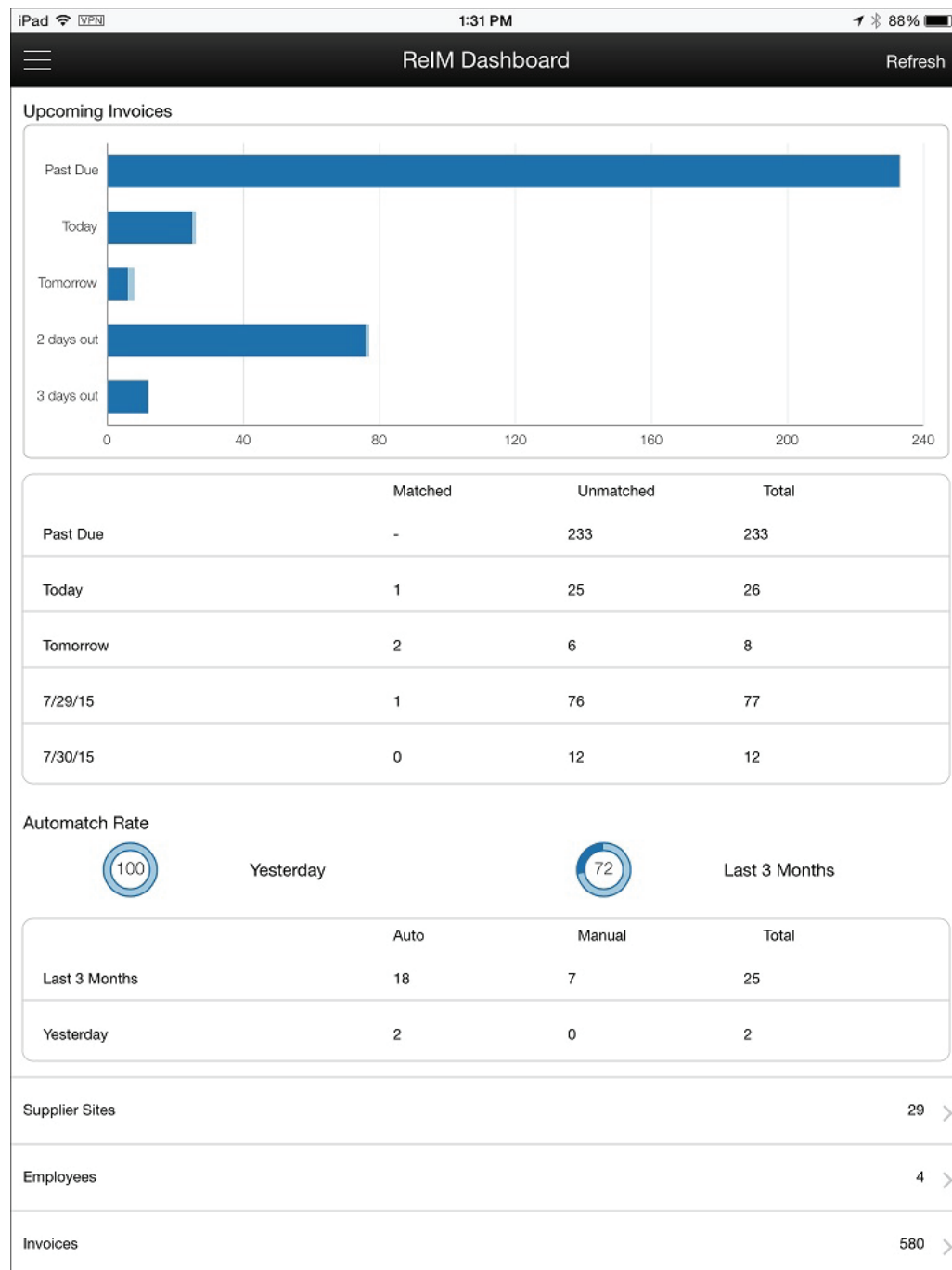
The following topics are covered in this chapter:

- ReIM Dashboard
  - [Upcoming Invoices Report](#)
  - [Automatch Rate Report](#)
  - [Supplier Site Criteria](#)
  - [Employee Details](#)
  - [Invoices](#)

### ReIM Dashboard

After logging into the application for the first time, select the ReIM dashboard in the menu.

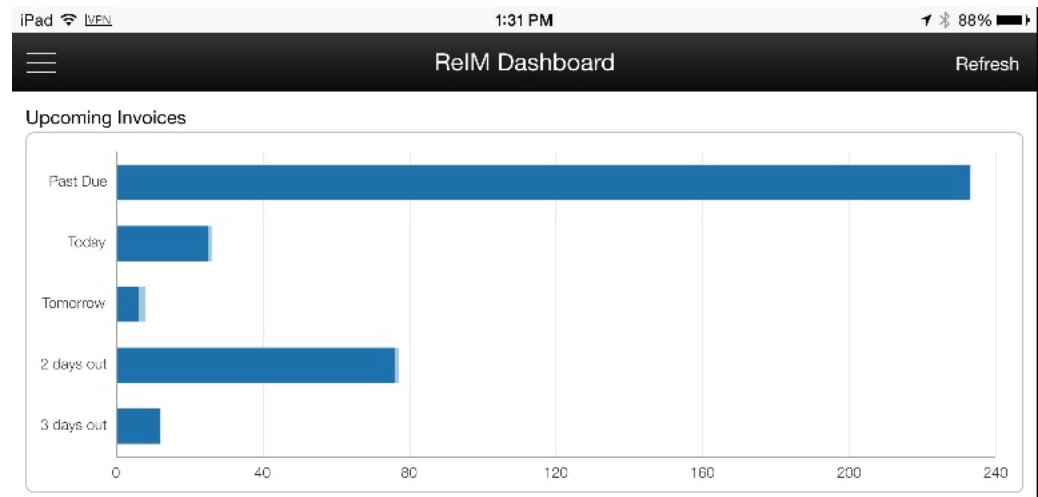
**Result:** The ReIM Dashboard appears with the upcoming Invoices report at the top.

**Figure 4–1 ReIM Dashboard**

**Tap** Refresh in the upper right corner in Portrait view on the tablet. The application will query the data and update the screen.

## Upcoming Invoices Report

The Upcoming Invoices section at the top use dark blue shaded bars to represent the remaining invoices that need to be manually matched by the user. The light blue shaded bars represent the invoices that have been manually matched.

**Figure 4–2 Upcoming Invoices Section**

Report date ranges include:

- **Past Due**
- **Today**
- **Tomorrow**
- **2 days out**
- **3 days out**

**Tap and Hold Over** the shaded bars and a pop-up appears showing the numeric value of that bar.

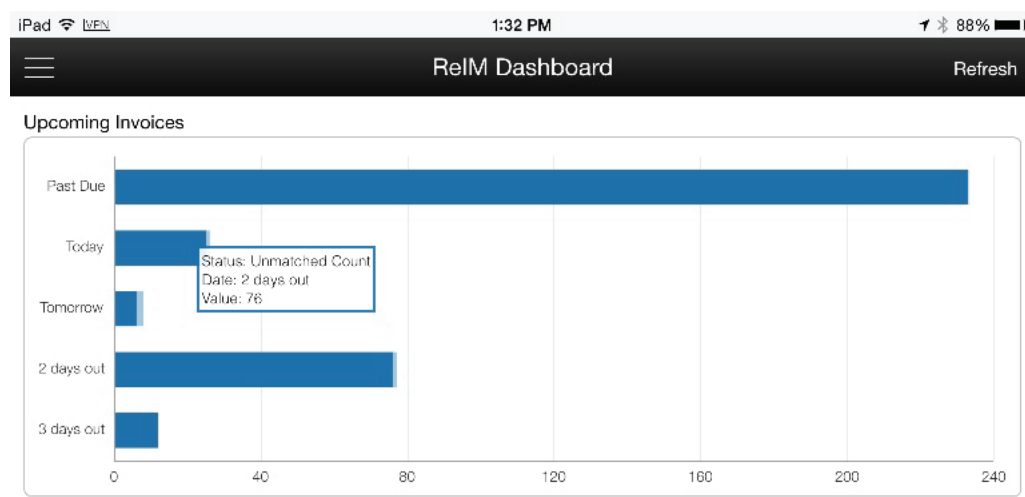
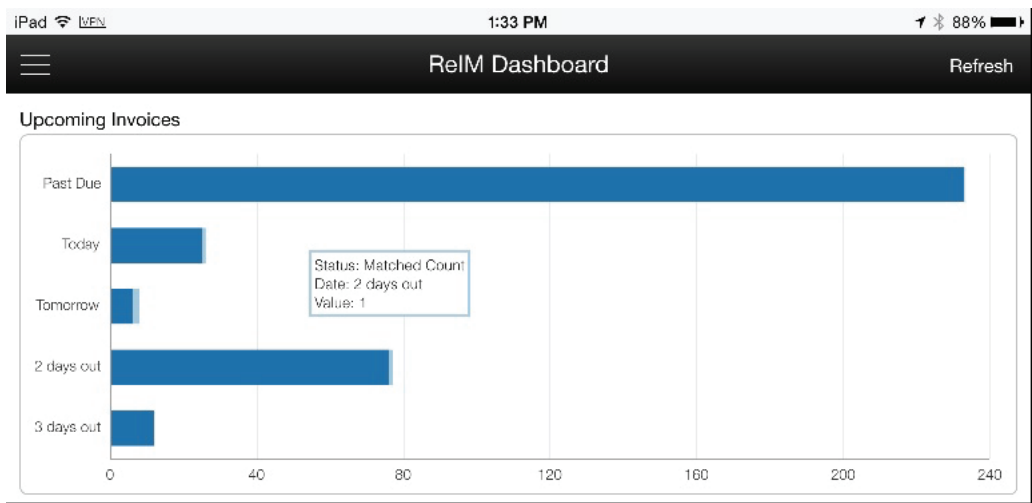
**Figure 4–3 Dark Blue Bar Tap and Hold Detail Pop-Up**

Figure 4–4 Light Blue Bar Tap and Hold Detail Pop-Up



The table directly under the Upcoming Invoices section shows the number of matched and unmatched invoices for each date range listed previously. It also shows the total of the combined matched and unmatched invoices.

**Note:** The data displayed will be a roll up of all the employees that roll up to the user. For Past Due Matched, a dash will be displayed as it doesn't make functional sense to display a metric for invoices matched in the past. Unauthorized users will see zeros in this area.

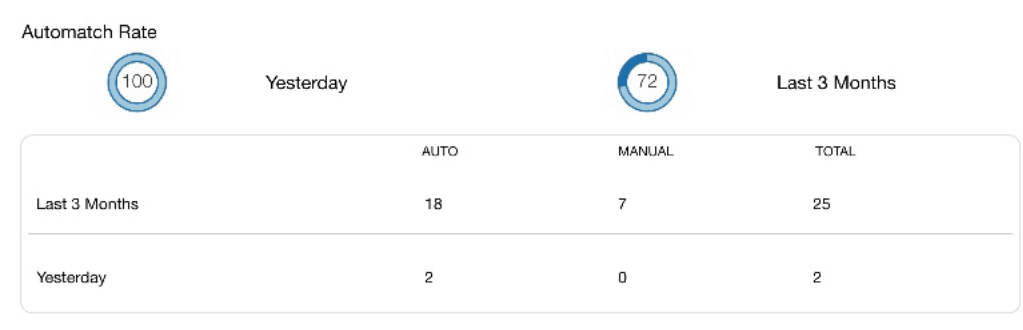
Figure 4–5 Upcoming Invoices Details Section

	Matched	Unmatched	Total
Past Due	-	233	233
Today	1	25	26
Tomorrow	2	6	8
2 days out	1	76	77
3 days out	0	12	12

Automatch Rate Report

The AutoMatch Rate report will allow you to quickly see the total number of invoices in matched status that were matched by the auto match batch in comparison with the total number of invoices that were manually matched by the ReIM user. Auto resolved invoices will also be included in the Automatch totals. The table underneath the Automatch Rate donut chart will show the totals.



**Figure 4–6 Automatch Rate Window**

- The number shown and represented by the light blue bar is the number that is auto matched.
- The remaining percentage represented by the dark blue bar will be the number that was manually matched.
- The number in the center is the percentage of the invoices that were auto matched by the auto match batch.

The report will be calculated for the user and can be viewed 2 different ways.

- Yesterday
- Last 3 months

The data displayed will be as follows:

- **Finance Manager:** Data will be a rollup of all of the employee's outstanding invoices. A manager's assigned suppliers (if any) are included in their data rollup.
- **Buyer:** Buyer reports will have zeros displayed. A Buyer will only be able to search for suppliers or invoices but will not have any data filtered for them.

## Supplier Sites

You can view supplier performance in this section. The number represents the total number of suppliers. Once you are in the Supplier sites screen, you can apply a filter to narrow down the supplier list.

**Figure 4–7 Supplier Sites Area**

Tap on the arrow to access the Supplier site screen where you can view supplier performance.

**Figure 4–8 Supplier Sites Screen**

Supplier Site	Rating	Count
TG Sup Site 1	★★★★★	65
RMS_ITEM_SupplierSite_196724751	★★★★☆	43
JJ Supplier Site 1	★★★★☆	34
Tim Supplier Site 13000101	★★★★☆	20
Jerry's supplier Site	★★★★☆	9
LM Supplier Site 3 - USD	★★★★☆	8
LONG SUPPLIER NAME	★★★★☆	5

The Supplier Sites area is marked as follows:

**Figure 4–9 Supplier Sites Screen Detail**

Supplier Site	Rating	Count
TG Sup Site 1	★★★★★	65

1. **Back:Tap** < Back link to return to the ReIM dashboard.
2. **Filter Panel:** This panel displays all of the filters that you set. When you tap on this section, the Supplier Sites Criteria screen will open and allow you to update the invoice criteria by Supplier Site, Employee, or Number of Outstanding Invoices.
3. **Magnifying Glass Search:** Tapping on the magnifying glass will enable a text box for a keyword search where you type in a word and conduct a search. This search will re-query the database so it is independent from the filter that is already selected. (For example, if you filtered on Atlas Supplier's invoices but tap the magnifying glass and enter an invoice from another supplier, the invoice details for that supplier will be returned). You can search for the following details and can enter a partial description:
  - Supplier site name
  - Supplier site

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**Note:** There will be an X icon in the text box that will allow you to clear the current search. You can use the Screen sort and Sort order to apply to the search that was conducted by the magnifying glass search. The only way to clear the current search is to go back into the Text box and use the X icon to clear it, or to move to another screen, or toggle to a different date range.

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4. **Screen Sort:** Allows the user to determine how to sort the screen. The default for the Supplier site screen is a Sort by # of Invoices (descending), but if you tap inside this section you are given the choice to select a sort by Supplier site Name and it will default to an A-Z sort.
5. **Sort Order:** Tapping this section changes the sort order. If you are sorting By Number of Invoices, the change will update to show the least number of invoices first. If you are sorting by Supplier site Name it will change it to a Z-A sort.
6. **Supplier Details:** Each supplier site is listed and you can scroll vertically to see all suppliers. The details shown for each supplier are:
  - Supplier site name
  - Supplier site scorecard rating
  - Supplier site ID
  - Total amount of outstanding invoices in the supplier's currency
  - The number on the far right is the total number of outstanding invoices for each supplier.
7. **Supplier Site Scorecard:** This is a star rating that is shown at the supplier site level. The supplier site rating is based on certain parameters such as discrepancy occurrence rate, exact matches versus matches within tolerance, and shipping performance. Each criteria's weight assignment is stored on a configuration table in ReIM.

## Supplier Site Criteria

When you click on the Supplier Site Filter Panel area, that the Supplier Site criteria screen opens which you can use to filter the results. The Criteria selection will only apply to the Supplier Site screen, and the inputs will be saved for each user.

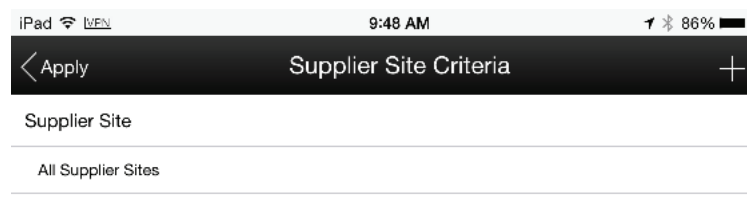
**Figure 4–10 Supplier Site Criteria**

The following options are available:

- **Apply** - Tapping Apply brings you back to the Supplier Site screen which refreshes and applies the selected filters you specified on the Supplier Site Criteria screen. The filter is saved by the user and kept for subsequent logins until that user updates the filter criteria.
- **Clear** - Tapping Cancel removes all of the filters that have been selected but not yet applied.
- **Criteria Applied** - Shows how many of the following sections have criteria applied.
- **Reset** - Tapping this button will set all of the criteria back to the executed set of criteria.
- **Supplier Site** - Tapping the arrow in this row opens the Supplier Site Criteria search window.
- **Employees** - Tapping the arrow in this row opens the Employee Search window.
- **Number of Invoices** - Tapping in the arrow in this row enables an entry field where you can enter the number of invoices to filter the supplier sites. Only those supplier sites will show that have outstanding invoices above this number.

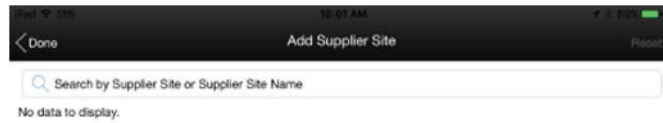
## Supplier Site Criteria Search Screen

When you tap on the arrow in Supplier Site or Employees row in the Supplier Site Criteria screen, you are brought to a series of search screens that you can use to select supplier sites or users, and filter supplier sites by those criteria. The criteria selection will only apply to the Supplier Sites screen, and the inputs will be saved for each user.

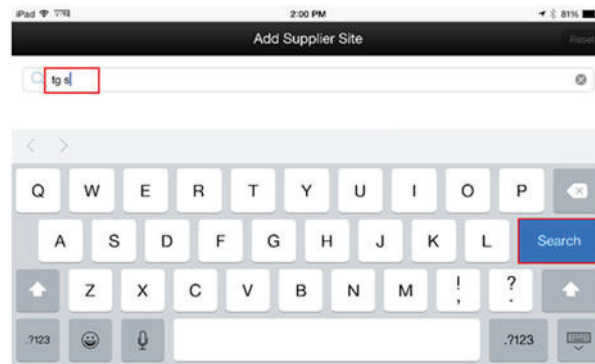
**Figure 4–11 Supplier Site Criteria Search Screen**

The following options are available:

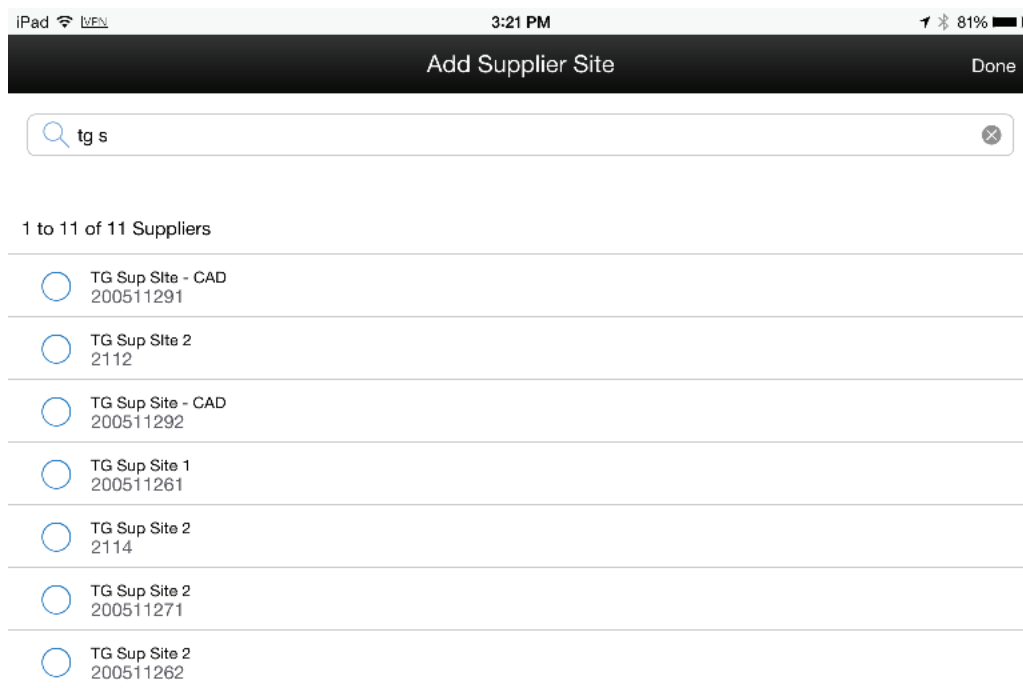
- **Apply** - Brings you back to the Supplier Site Criteria screen which refreshes and applies the selected supplier sites you selected on the s screen. The filter is saved by user and kept for subsequent logins until the user updates the filter criteria.
- **Reset** - Tapping this button will enable you to enter a new set of Supplier Site filters.

**Figure 4–12 Add Supplier Site Screen**

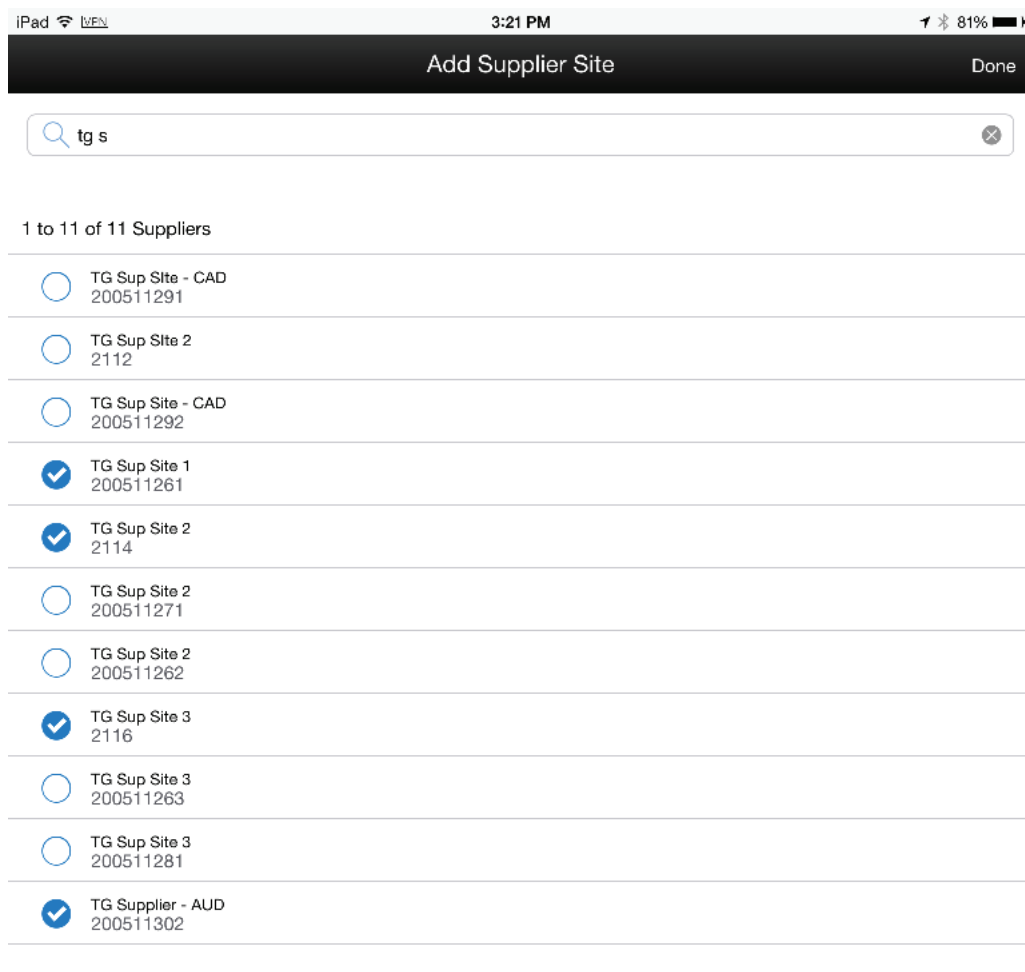
The Reset button enables the keyword search section that allows you to either type in the Supplier site name or ID. You must enter at least 1 character to perform a keyword search.

**Figure 4–13 Searching for Supplier Sites using Keywords**

Type in the desired keywords and tap the **Search** button to see the results.

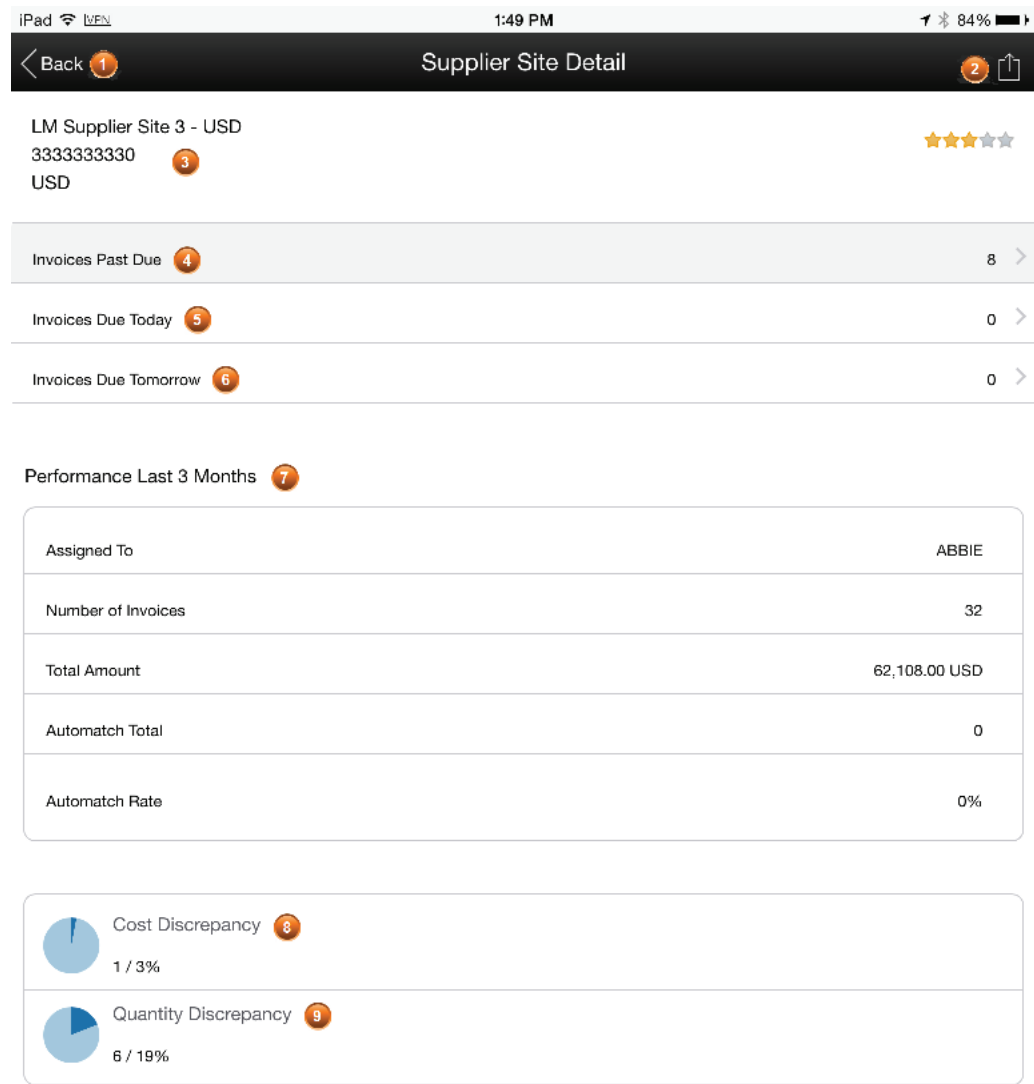
**Figure 4–14 Keyword Search Results**

Select the supplier sites that you want to include in your filter by selecting the circle next to each supplier site ID and Name. Tap Done to return to the Add Supplier Site screen with the results of the keyword search.

**Figure 4–15 Supplier Site Filter Ready to Apply**

## Supplier Site Details

When you tap on the arrow for a specific supplier site the details for that supplier site are displayed on the Supplier Site Details screen.

**Figure 4–16 Supplier Site Details**

This area includes the following details about the supplier site:

- Back:** Tap < Back link to navigate back to the Supplier Site screen to see the full list of filtered suppliers.
- Share Icon:** Allows you to e-mail the details in a contextual format. When you tap the share icon, you are taken to an e-mail and the fields will be as follows:
  - To:**
  - CC/BCC:**
  - Subject:** Supplier Site Detail

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**Note:** See Chapter 2: Sending an E-mail for more information

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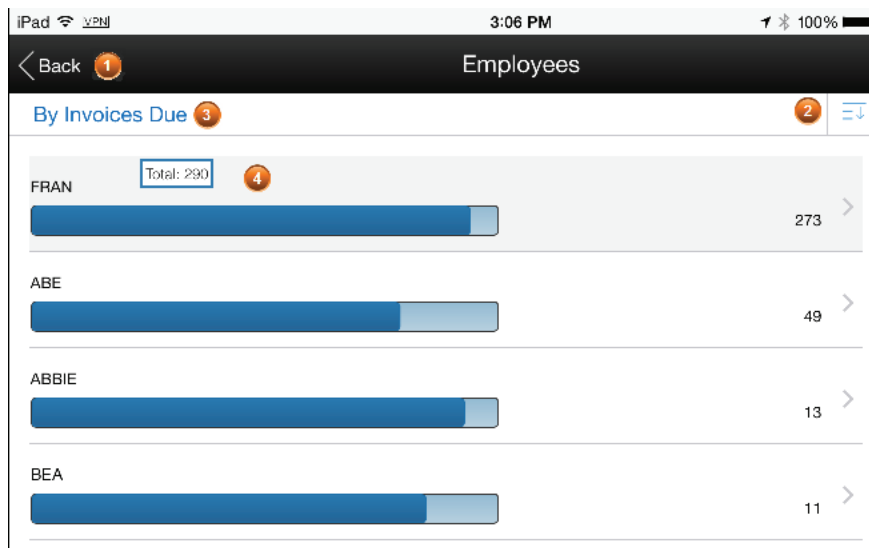
- Supplier Site:** This section shows the name of the supplier site that was selected from the previous Supplier site screen. This section also lists the Supplier Site ID and Supplier Currency as well as the supplier performance star rating.

4. **Invoices Past Due:** This section shows the number of invoices past due for the particular supplier site. When you tap in the Invoices Past Due box, you will be taken to the Invoices screen which displays all the invoices for the selected supplier that are past due.
5. **Invoices Due Today:** This section shows the number of invoices which are due today for the particular supplier site. When you tap in the Invoices Due today box, you are taken to the Invoices screen and it shows you all invoices for the selected supplier site that are due today.
6. **Invoices Due Tomorrow:** This section shows the number of invoices which are due tomorrow for the particular supplier site. When you tap in the Invoices Due tomorrow box, you are taken to the Invoices screen and it shows you all the invoices for the selected supplier that are due tomorrow.
7. **Performance Last 3 Months:** The description of various data points in the Supplier Site performance section is as follows:
  - **Assigned to:** This is the name of the employee that is responsible for matching the invoices for the supplier site that is displayed. This is typically someone in an Accounts Payable/Reviewer role.
  - **Number of Invoices:** This number represents the total number of the invoices by the given supplier site over the past 3 months.
  - **Total Amount:** This is the total monetary value of the invoices over the past 3 months in Supplier currency for the given supplier site.
  - **Automatch Total:** This shows the total number of invoices over the past 3 months for the given supplier site that were matched successfully by the automatch process.
  - **Automatch Rate:** This shows the percentage of invoices that were automatched out of the total invoices over the past 3 months for the given supplier site.
8. **Cost Discrepancy:** The number of total invoices for the given supplier site over the past 3 months that had a cost discrepancy and the percent to total that this represents. There is a pie chart to show this information, light blue part of pie chart represents total number of invoices with discrepancy and dark blue represents number of invoices with discrepancy. Next to the pie chart, this section shows number of invoices with discrepancy along with as a percent to total number of invoices.
9. **Quantity Discrepancy:** The number of total invoices for the given supplier site over the past 3 months that had a quantity discrepancy and the percent to total that this represents. There is a pie chart to show this information, light blue part of pie chart represents total number of invoices with discrepancy and dark blue represents number of invoices with discrepancy. Next to the pie chart, this section shows number of invoices with discrepancy along with as a percent to total number of invoices.

## Employees

This area is enabled for users that have employees reporting to them by tapping the Employee section on the ReIM dashboard.



**Figure 4–17 Employees Screen**

This area includes the following choices:

1. **Back:** Tap <Back link to return to the main dashboard screen
2. **Sort Order:** Tapping this section changes the sort order. If you sort By Invoices Due for example, the change will update to show the smallest number of invoices first. If you are sorting by employee name, the sort is descending rather than ascending.
3. **Screen Sort:** This section allows you to determine how to sort the screen. The default for the Employees screen are by Total Invoices due (Descending), but if you tap inside this section you are given the choice (dropdown) to sort by Employee name (ascending).
4. **User Name with Horizontal Graph:** The horizontal bar graphically shows the employee progress. The darker shading on the bar represents the number of invoices remaining, the lighter shading on the bar shows the number of invoices matched. Tap and Hold Over a shaded bar and a pop-up appears showing the numeric value of that portion of the bar.

## Employee Details

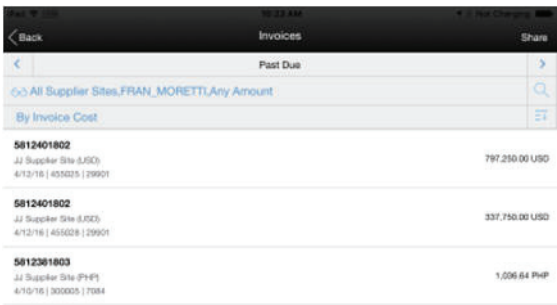
This screen appears when you tap on the arrow or anywhere on the row containing an employee name in the Employees screen.

Figure 4–18 Employee Details



- 1. **Back:Tap** <Back link to return to the Employee screen.
- 2. **User Name:** Shows the user name of the employee that is selected from the previous Employee screen.
- 3. **Invoices Due:** This section shows the count of the outstanding invoices against the particular employee that need to be manually matched. They are listed and summarized for the following dates. The number of outstanding invoices for each date are shown on the right side of each row. Tapping on any of the rows or arrows opens the Invoices screen where you can see the list of all outstanding invoices for the particular date and employee:
  - Past Due
  - Today
  - Tomorrow
  - 2 days out
  - 3 days out

Figure 4–19 Past Due Invoices for Selected Employee

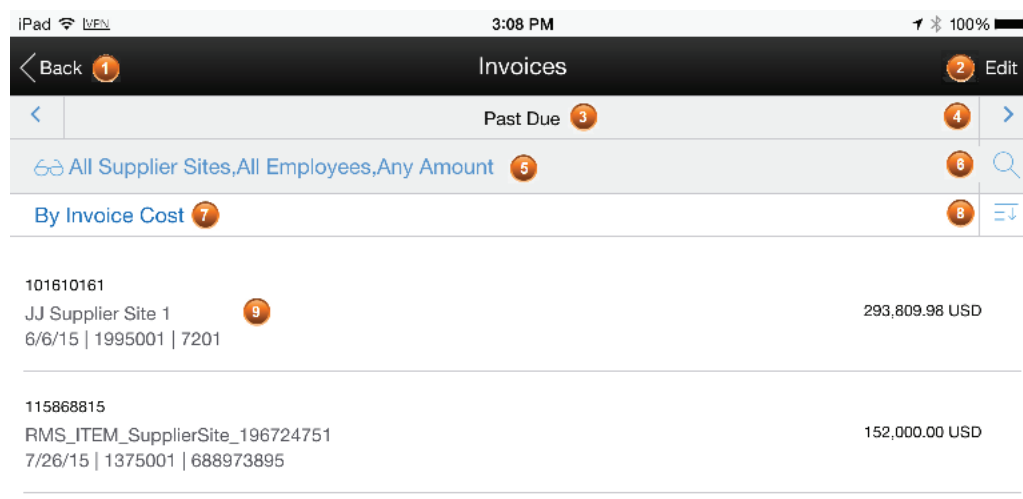


Invoices

The Invoices screen is where you can view a list of invoices that are due, and need to be matched. It can be accessed from various places: The ReIM dashboard, Supplier Site Details, and the Employees screen. The number represents the total number of invoices that are outstanding. Once in the invoices screen, you can apply a filter to narrow

down how the invoices are viewed. When you launch into the invoices screen from the dashboard screen, the invoices for All suppliers, All employees (Manager Role), and invoices that are Past Due appear. You can tap through the different due dates to see other dates.

**Figure 4–20 Invoices**



1. **Back:** Tap <Back link to return to the previous screen which could be Supplier Detail, Employees, or the ReIM Dashboard screen.
2. **Share:** Tap Share enables selection of the invoices so you can act by sending the selected invoices to someone to look into further.

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**Note:** See Chapter 2: **Sending an E-mail** for more information

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3. **Time Periods:** Displays what time period that the invoices are currently being filtered by (filter was chosen from the previous screen). The possible periods for this section include:
  - Past Due
  - Today
  - Tomorrow
  - 2 days out
  - 3 days out
4. **Forward and Backward Arrows:** When you Tap either the forward or backward arrow, the screen will refresh and display the invoice details based on this new time filter. This will just be a continuous loop. So when you are 3 days out and you tap the forward arrow, you are taken to the Past due invoices. When on past Due, tap the backwards arrow and you are taken to the 3 days out view.
5. **Filter Panel:** This panel displays all of the filters that you set and are carried over from the previous screen. When you tap on this section the Invoice Criteria screen opens and allows you to update the invoice criteria by Supplier, Employee, or Invoice amount.
6. **Magnifying Glass Search:** Tapping on the magnifying glass will enable a text box for a keyword search where you type in a word and conduct a search. This search

will re-query the database so it is independent from the filter that is already selected. (For example, if you filtered on Atlas Supplier's invoices but tap the magnifying glass and enter an invoice from another supplier, the invoice details for that supplier will be returned). You can search for the following details and can enter a partial description:

- Invoice
- Supplier site name
- Supplier site

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**Note:** There will be an X icon in the text box that will allow you to clear the current search. You can use the Screen sort and Sort order to apply to the search that was conducted by the magnifying glass search. The only way to clear the current search is to go back into the Text box and use the X icon to clear it, or to move to another screen, or toggle to a different date range.

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7. **Screen Sort:** Allows the user to determine how to sort the screen. The default for the Invoices screen are by Total Invoice Cost (Descending), but if you tap inside this section you are given the choice to sort by Invoice (Ascending).
8. **Sort Order:** Tapping this section changes the sort order. If you are sorting By Invoice Cost, the change will update to show the smallest cost invoice first. If you are sorting by Invoice it will change the sort order to descending.
9. **Invoices:** Each individual invoice is listed for the given supplier after applying all of the other filters. For each invoice this area displays the supplier site, supplier site name, invoice due date, invoice, location, and invoice cost.

# Part V

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## Oracle Retail Merchandising System

The following chapter provides guidance for System Administrators, Customers, and System Integrators who securely administer, customize, and integrate with the Oracle Mobile Merchandising Applications.

Part V contains the following chapters:

- Mobile Merchandising
- Retail Merchandising System



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## Using the Mobile Merchandising System: Retail Merchandising System Recent Orders

This chapter describes the methods by which you review recent purchase orders from RMS. You can approve or reject one or multiple orders that are in worksheet and submitted status.

The following topics are discussed in this chapter:

- [Getting Started: Using Recent Orders for the First Time](#)
- [Order Summary Screen](#)
- [Order Details](#)
- [Order Actions: Order Summary and Order Detail Screens](#)
- [Mass Updating Orders](#)

### Getting Started: Using Recent Orders for the First Time

Oracle Retail Mobile Merchandising: Retail Merchandising System has the following options:

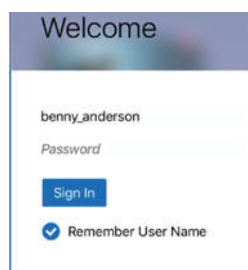
- Accessing the Recent Orders Screen
- Selecting Criteria

### Accessing the Recent Orders Screen

When accessing the Recent Orders screen for the first time, you will see the screen displayed in Figure 5-3, indicating the need to set your default search criteria before POs can be viewed. To access the Recent Orders screen:

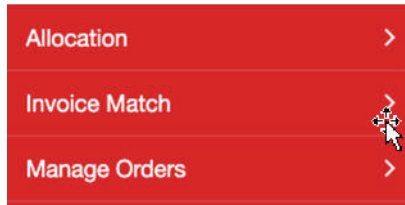
1. Login to the application.

**Figure 5–1** *Welcome Screen*



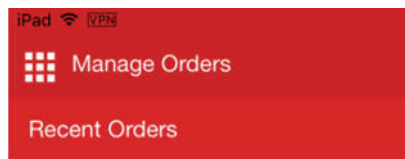
2. Tap Manage Orders. The Recent Orders option appears.

**Figure 5–2 Manage Orders**

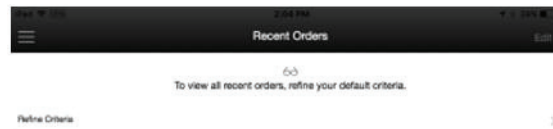


3. Tap Recent Orders. The initial Recent Orders criteria screen appears.

**Figure 5–3 Recent Orders**



**Figure 5–4 Recent Orders Initial Criteria Screen**



4. The following three actions are available in the Criteria screen
  - Tap the Cancel button to return to the Recent Orders screen without applying any new criteria selections.
  - Tap the Reset button to reset the search criteria to the initial first time settings.
  - Tap the Apply arrow to execute the search based on the choices made during criteria selection. The Recent Order screen appears with the results.

## Selecting Criteria

The Criteria screen sets and refines default search criteria. Each time the user logs into the Recent Orders mobile application, it renders their "Recent Orders" search list against the criteria saved here. To access the Criteria screen after the initial visit:

1. Login to the application.
2. Tap Recent Orders. The Recent Orders screen appears.
3. Tap the Eyeglasses icon. The Criteria screen appears.



**Figure 5–5 Recent Orders Criteria Screen**

Criteria Applied: 0 [Reset](#)

Status:	Any Status >
Created By:	All Users >
Created Date:	All Dates >
Supplier Site:	All Supplier Sites >
Origin:	Any Origin >
Departments:	All Departments >

Field	Description
Status	<p>StatusLimits the orders returned by an order's current status. You can select One Status or Any Status for which to return results. Valid values include: Any Status (Default), Worksheet, Submitted, and Approved.</p> <p>Note: Any Status is the default. It only returns the statuses listed above and will not include closed orders.</p>
Created By	Limits the returned orders by a User ID. You can select one or more User IDs to be applied to the criteria from a list. This is defaulted to "All Users" the first time you enter this screen. If one User ID is selected, then the User ID is displayed. If multiple User IDs are selected, then this reads "Multiple Users".
Created Date	Limits the returned orders based on the create date for the Purchase Order. Valid values include: Today, Last 2 days, Last 7 days, Last 30 days, and All Dates (Default).
Supplier Site	Limits the returned orders to a specific supplier site. You can select one or more supplier sites to be applied to the criteria from a list. This is defaulted to "All Supplier Sites" when you access this screen for the first time. If one supplier site is selected, then the supplier site's ID is displayed. If multiple supplier sites are selected, then this reads "Multiple Supplier Sites". All active supplier sites are able to be selected, however if you are assigned to a specific organizational unit in RMS, then only those suppliers associated with the organizational unit associated with the user are able to be selected.
Origin	<p>Limits the returned orders based on how they originated. Only one value can be selected to limit the criteria.</p> <p>Valid values include: Any Origin (Default), Current System Generated, Past System Generated, Manual, Buyer Worksheet, Consignment, Vendor Generated, AIP Generated PO, SIM Generated PO, and Allocation Generated PO.</p>
Department	Limits the returned orders to only those that have corresponding items in the specified departments. If one department is selected, then the department's ID is displayed. If multiple departments are selected, then this reads "Multiple Departments". All departments are able to be selected, however it is limited based on any data level security for the user set in RMS.

The following criteria have the ability to search for specific information and select one or more values:

- Created By
- Supplier Site
- Departments

Tap on the following to access the search capabilities for the choices above:

- All Users
- All Supplier Sites
- All Departments

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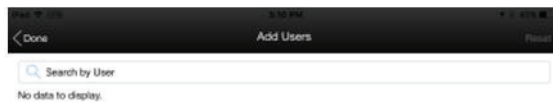
**Note:** It may not be these values always. If you had previously selected one or more values then it will not show as 'All Users' but either the specific user or multiple users for example.

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Add Users is outlined here. The other choices use a similar process:

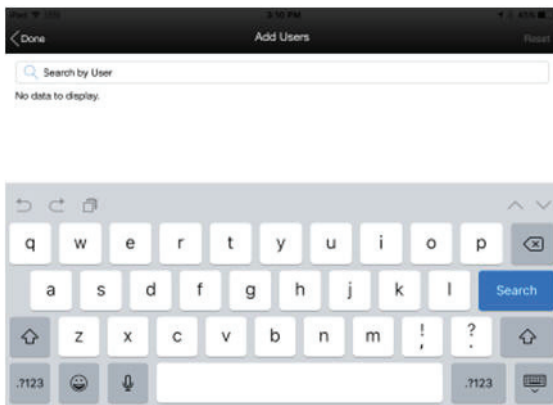
1. Tap the Created By criteria: All Users.
2. Tap Reset. The Add Users screen appears.

**Figure 5–6 Add Users Screen**



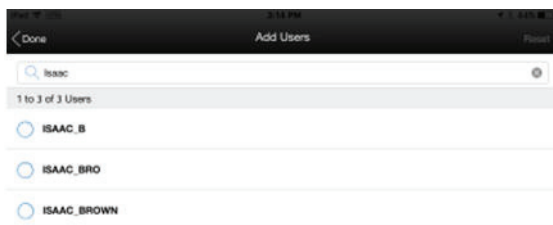
3. Tap anywhere in the Search by User box. The keyboard appears

**Figure 5–7 Search by Users Screen**



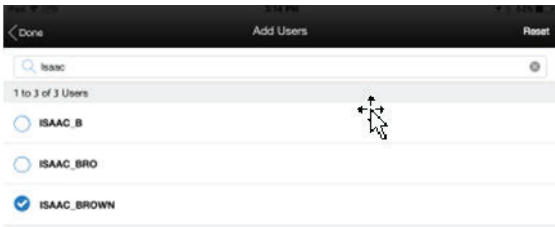
4. Enter all or part of a user name.
5. Tap Search. The Users meeting the criteria appear.

**Figure 5–8 Recent Orders Users Meeting Criteria Screen**



6. Tap the option button for each user you want to include

Figure 5–9 Recent Orders Add Users Screen



- 7. Tap **Done**.
- 8. To go back to the list of users, tap **Add**. You can add or remove any users in the list. You can also change the search criteria to add users. Any users selected based on the previously entered criteria remain in the list.

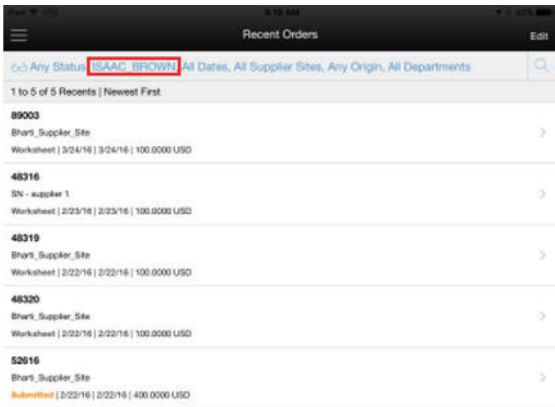
Figure 5–10 Users Criteria Screen



- 9. Tap **Apply**. The Recent Orders Criteria screen appears.
- 10. Tap **Apply** again. The recent orders for the selected users appear in the list.

**Note:** Departments and Supplier Site search will also follow a similar workflow.

Figure 5–11 Recent Orders Screen

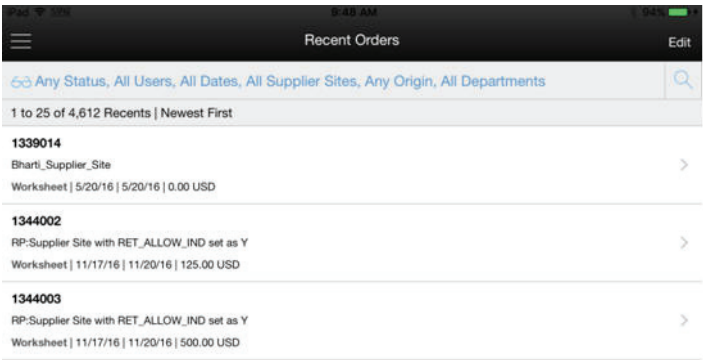


Magnifying Glass Search: Tapping on the magnifying glass located below the Edit button will enable a text box for a Search by Order Number query where you type in the Order Number and conduct a search. This search will re-query the database so it is independent from any filter that is already selected.

## Recent Orders

The Recent Orders screen shows the list of orders based on the criteria selected. Actions include tapping the Edit button which allows you to quickly select orders to approve, reject, share, or update dates.

Figure 5–12 Recent Orders



**Note:** The Edit button label changes to Cancel. You can cancel the action at any time by tapping Cancel.

Field	Description
Order Number	Displayed at the top of each order in bold
Supplier Site	Displays the name of the supplier site for the purchase order below the order number
Status	The description of the status of the order: <ul style="list-style-type: none"><li>■ Worksheet (GRAY)</li><li>■ Submitted (YELLOW)</li><li>■ Approved (GREEN)</li></ul>
Not Before Date	Not Before Date of the purchase order
Not After Date	Not After Date of the purchase order
Total Cost	The total cost of the order in order currency Example: 10,000.00 USD

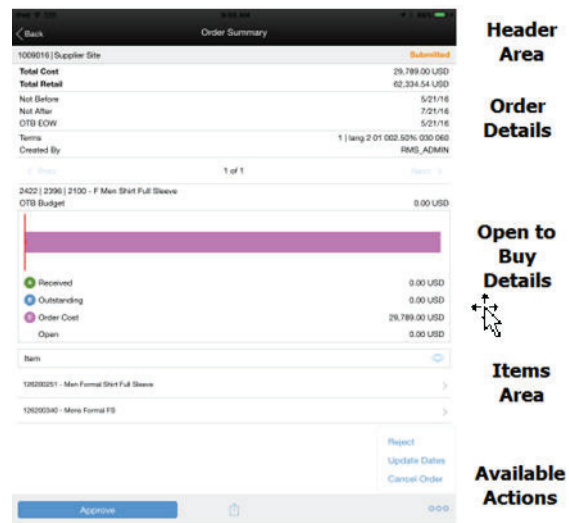
**Note:** Availability of action will be based on the status of the orders selected.

## Order Summary Screen

The Order Summary screen displays a summary of the purchase order information, for the order selected on the Recent Orders page. To access the Order Summary screen:

1. Tap on any Recent Order. The Order Summary screen appears.

Figure 5–13 Order Summary Screen



Area	Description
Header	<p>Displays the following information pertaining to the selected record:</p> <ul style="list-style-type: none"> <li>■ Order Number</li> <li>■ Supplier Site Description</li> <li>■ Status</li> </ul>

Area	Description
Order Details	<p>Displays the following information:</p> <ul style="list-style-type: none"><li>■ Total Cost - Represents the total cost of the order in the order's currency. It is calculated as the sum of the order quantity times the order cost for each item or location in the order.</li><li>■ Total Retail - Represents the total retail value of the order in the order's currency. It is calculated as the sum of the order quantity times the unit retail price for each item or location in the order.</li><li>■ Dates - The following choices are available:<ul style="list-style-type: none"><li>■ Not Before - Represents the start of the shipping window for a purchase order.</li><li>■ Not After - Represents the end of the shipping window for a purchase order.</li><li>■ OTB EOW - Represents the OTB End of Week date for a purchase order.</li></ul></li><li>■ Payment Terms - The ID and description of the payment terms for the order.</li><li>■ Created By - Represents the User ID of the person who created the purchase order.</li><li>■ Warning Symbol and Message - If the open to buy budget for one or more subclasses represented on the order has been exceeded, a warning symbol and message displays at the bottom of this area. The message will read "One or more subclasses on the order have exceeded their Open to Buy."</li></ul>

Area	Description
OTB Details	<p data-bbox="691 228 1349 359">Displays the OTB details for the order, by subclass. This section allows you to tap on the "Next &gt;" and "&lt; Prev" links to see each subclass represented on the order to view the impact on that subclass's OTB). For each subclass the following is displayed.</p> <ul data-bbox="691 373 1349 1535" style="list-style-type: none"> <li data-bbox="691 373 1349 428">■ Department, Class, and Subclass combinations for the order followed by the subclass name</li> <li data-bbox="691 443 1349 518">■ The total OTB budget for the subclass in the end of week date for the PO. The PO and order type are shown in the order currency.</li> <li data-bbox="691 533 1349 1535"> <p data-bbox="737 533 1349 747">The OTB graph presents the total value of received and approved orders for the subclass, order type, and OTB EOW day shown. The order cost is represented separately for unapproved orders. The red line in the graph represents the budget amount to show you visually whether you are over or under your OTB budget. The following fields have icons to represent their corresponding values in the graph:</p> <ul data-bbox="945 762 1349 1535" style="list-style-type: none"> <li data-bbox="945 762 1349 892">■ <b>Received-</b> Received amount on the OTB table for subclass, OTB EOW date, and order type.</li> <li data-bbox="945 907 1349 1058">■ <b>Outstanding</b> - Approved amount on the OTB table , less received amount, for the subclass, OTB EOW date, and order type.</li> <li data-bbox="945 1073 1349 1224">■ <b>Open</b> - Indicates the open budget in this subclass for purchases calculated as Budget minus Received minus Outstanding.</li> <li data-bbox="945 1239 1349 1535">■ <b>Order Cost</b> - The total cost for the items in the order in the displayed subclass in the order currency. Order Cost is only displayed if the order is in Worksheet or Submitted status. Otherwise, it will be included as part of the Approved Total above.</li> </ul> </li> </ul>

Area	Description
Items	<p>Shows the item number and description. Items can be displayed at the following levels:</p> <ul style="list-style-type: none"> <li>Item Parent - shows the item parent ID along with the primary image associated with the parent; if all items on the order have the item aggregate flag checked, then the default level is displayed.</li> <li>Item Parent/Diff - shows the item parent ID appended with the diff ID, separated by a colon (e.g. 10001234:RED), along with the primary image associated with the first item found matching the item parent/diff combination.</li> <li>Item - shows the transaction level item ID along with the primary image associated with the transaction item; if some or none of the items on the order have the item aggregate flag checked, then the default level is displayed.</li> </ul> <p>Tapping the eye icon toggles the summary of the items on the list between the above options and updates the description in the heading with the level selected. You can also hard tap the eye icon and then a popup appears where you can select the item level you want to see. Items are sorted by item description.</p> <p>Clicking on the item image or item description (if no image exists) will take you to the Order Details page for the selected item.</p>
Available Actions	<p>Available Actions You will have one or more actions available to perform on the order, based on your user privileges and order status. Available actions include:</p> <ul style="list-style-type: none"> <li>Approve</li> <li>Reject</li> <li>Cancel</li> <li>Update Dates</li> <li>Share</li> </ul>

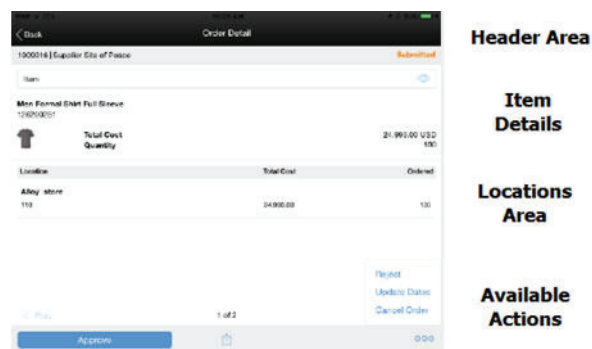
Order Status	User Privilege	Main Action Button Label	Other Actions
Worksheet	Approve PO	Approve	Update Dates, Cancel (only if order was previously approved)
Worksheet	Maintain PO	Update Dates	Cancel (only if order was previously approved)
Submitted	Approve PO	Approve	Reject, Update Dates, Cancel (only if order was previously approved)
Submitted	Maintain PO	Reject	Update Dates, Cancel (only if order was previously approved)
Approved	Approve PO	Cancel	Update Dates
Approved	Maintain PO	Cancel	Update Dates
Approved	View/Search PO	None	None



## Order Details

The Order Detail screen displays the item detail based on your selection from the Order Summary screen. To access the order details for an item, tap on any item in the Items area. The Order Detail screen appears.

**Figure 5–14 Item Order Detail Screen**



Area	Description
Header	<p>Displays the following information pertaining to the selected record:</p> <ul style="list-style-type: none"> <li>Order Number</li> <li>Supplier Site Description</li> <li>Status</li> </ul>
Item Details	<p>The item section of this page displays the item level at which the page was accessed (Item Parent, Item Parent/Diff, or Item) and the eye icon, which allows you to change the item level. A hard tap opens the popup where item level can be selected, the information below also changes to reflect the data.</p> <p>You can scroll through the items in the order at the level that you are viewing (item parent, item parent/diff, or item). An indication of the total number of items in the order and which item you are viewing is displayed, using the Next or Previous button to scroll through the items on the order. Moving between items on the order refreshes all item related data on this page.</p> <ul style="list-style-type: none"> <li>Item Image - Primary image for the item is displayed</li> <li>Item Description - Description of the item parent.</li> <li>Item Number - ID for the item or item parent.</li> <li>Total Cost - Represents the total cost of the item on the order in the order currency, summarized to the item level shown at the top of the page.</li> <li>Quantity - Indicates the order quantity for the time across all locations on the order. If the item parent to item parent/diff is the level selected, order quantity is summarized to those levels.</li> </ul>

Area	Description
Locations Area	<p>The location area shows the total locations on the order for the item at the top. The data for the location is shown at the item level indicated at the top of the page (item, item parent, or item parent/diff). For each location, the following information is displayed:</p> <ul style="list-style-type: none"><li>■ Location - Shows the location description and ID.</li><li>■ Total Cost - Shows the total cost of the item at the location on the order, summarized to the item level shown at the top of the page.</li><li>■ Ordered Quantity - Shows the total quantity ordered for the item at this location, summarized to the item level shown at the top of the page.</li></ul>
Available Actions	<p>You will have one or more actions available to perform on the order, based on your user privileges. Available actions include:</p> <ul style="list-style-type: none"><li>■ Approve</li><li>■ Reject</li><li>■ Cancel</li><li>■ Update Dates</li><li>■ Share</li></ul>

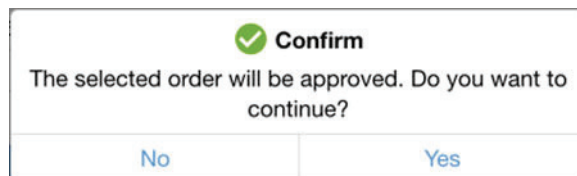
## Order Actions: Order Summary and Order Detail Screens

The available actions for an order are listed in Table 5-3. The steps to complete these actions are as follows:

### Approve an Order

1. To approve an order, tap **Approve**. The Confirm pop up window appears.

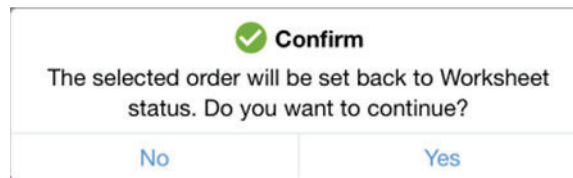
**Figure 5–15** Confirm Pop-up Window



2. Tap **Yes**. The order is approved.
3. Tap **OK** to clear the pop up window.

### Reject an Order

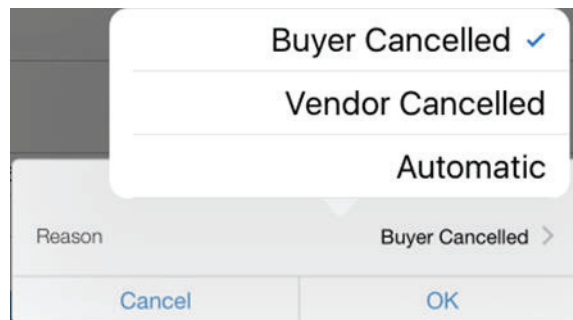
1. To reject an order, tap the ellipses button.
2. Tap **Reject**. The Confirm pop up window appears.

**Figure 5–16 Confirm Reject Pop-up Window**

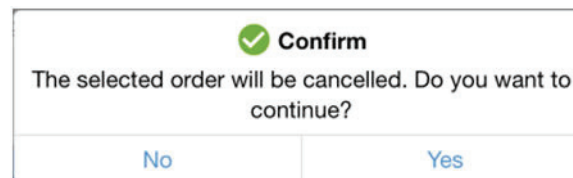
3. Tap **Yes**. The order is set back to Worksheet status.
4. Tap **OK** to clear the pop up window.

## Cancel an Order

1. To cancel an order, tap **Cancel Order**. A pop up window appears.
2. Tap on the arrow next to the reason. The following choices appear:
  - Buyer Cancelled
  - Vendor Cancelled
  - Automatic

**Figure 5–17 Cancellation Reason List**

3. Tap the reason for the cancelation.
4. Tap **OK**. The Confirm pop up window appears.

**Figure 5–18 Confirm Cancel Pop-up Window**

5. Tap **Yes**. The order is cancelled.
6. Tap **OK** to clear the pop up window.

## Update Dates for an Approved Order

1. To Update Dates for an approved order, tap the Update Dates button. A pop up window appears.
2. The following dates can be edited:

- Not Before
- Not After
- OTB EOW

**Figure 5–19 Update Dates Window**

3. Tap the drop-down arrow corresponding to the date you want to change.
4. Tap and scroll to select the new Month, Day, and Year.

**Figure 5–20 Update Dates Selection Window**

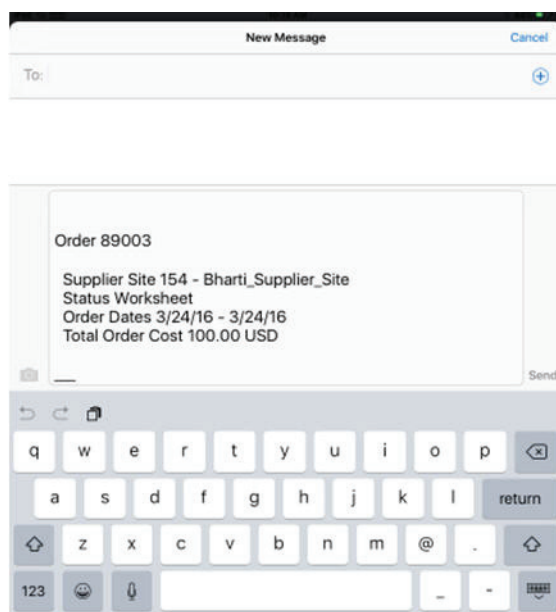
5. Tap anywhere on the screen to accept the new dates. Tapping Cancel discards any changes.
6. Tap OK. The Confirm pop up window appears.
7. Tap Yes. A pop up appears confirming the dates are updated.
8. Tap OK. The new dates appear in the corresponding fields for that order.

## Share an Order

The share icon located in the bottom toolbar will enable you to send a summarized view of the orders on this page via SMS or e-mail to a contact. This will allow you to clarify information about the PO or provide an explanation for why it cannot be approved in its current state. To share a PO:

1. Login to the application.
2. Tap the Share icon.
3. Tap either the SMS icon or the E-mail icon.
4. For SMS, enter the mobile number in the To: box and any message in the section below it. For E-mail, enter the e-mail address.

**Figure 5–21** *New Message Window*



5. Tap **Send**.

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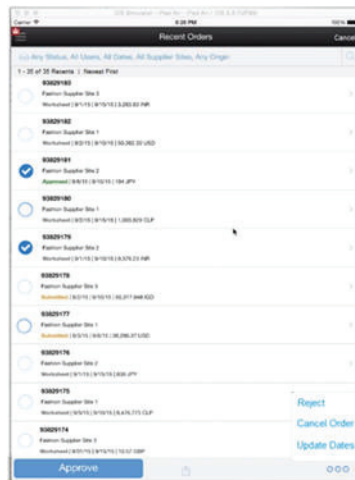
**Note:** For detailed information on how to send an e-mail, refer to Chapter 2, [Sending an E-mail](#)

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## Mass Updating Orders

When the Edit button is selected on the Recent Orders page, the view of the page changes to allow you to multi-select orders to either share, approve, cancel, update dates, or reject back to worksheet status. If you have just View privileges then the Edit button is called 'Share' and the only action possible is Share. The steps to complete these actions are as follows:

1. Tap the **Edit** button. Radio buttons appear to the left of each order in the list.

**Figure 5–22 Recent Orders Edit Window**

2. Tap one or more radio buttons to select them for mass updates.
3. Tap the desired Action button (based on the status of orders selected) and complete the desired process.

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## Using the Mobile Merchandising System: Retail Merchandising System Recent Transfers

This chapter describes the methods by which you review recent transfers from RMS that are in worksheet and submitted status and approve one or multiple transfers. It also describes the user interface controls in more detail.

The following topics are discussed in this chapter:

- [Getting Started: Using Recent Transfers for the First Time](#)
- [Accessing the Recent Transfers Screen](#)
- [Selecting Criteria](#)
- [Recent Transfers Screen](#)
- [Transfer Details](#)

### Getting Started: Using Recent Transfers for the First Time

Oracle Retail Mobile Merchandising: Retail Merchandising System has the following options:

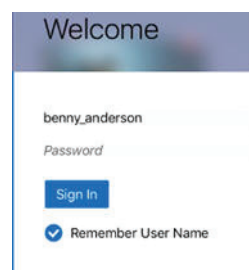
- [Accessing the Recent Transfers Screen](#)
- [Selecting Criteria](#)

### Accessing the Recent Transfers Screen

When accessing the Recent Transfers screen for the first time, you will see the screen displayed in Figure 5-3, indicating the need to set your default search criteria before POs can be viewed. To access the Recent Transfers screen:

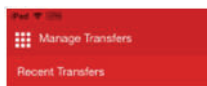
1. Login to the application.

**Figure 6–1 Login Screen**



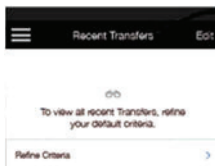
2. Tap Manage Transfers. The Recent Transfers option appears

**Figure 6–2 Recent Transfers Menu Option**



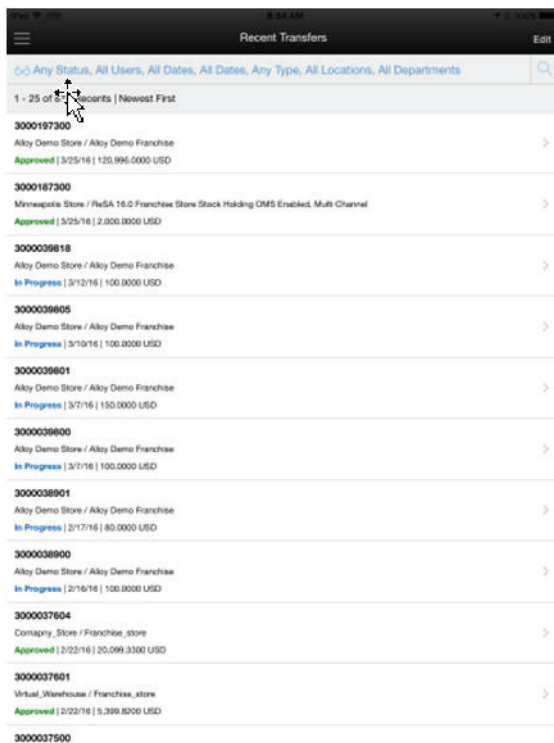
3. Tap Recent Transfers. The initial Recent Transfers criteria screen appears.

**Figure 6–3 Recent Transfers Initial Criteria Screen**



4. The following three actions are available in the Criteria screen:
  - Tap **Cancel** to return to the Recent Orders screen without applying any new criteria selections.
  - Tap **Reset** to reset the search criteria to the initial first time settings.
  - Tap the Apply arrow to execute the search based on the choices made during criteria selection. The Recent Transfers screen appears with the results.

**Figure 6–4 Recent Transfers Screen**





## Selecting Criteria

The Criteria screen sets and refines default search criteria. Each time the user logs into the Recent Transfers mobile application, it renders their "Recent Transfers" search list against the criteria saved here. To access the Criteria screen after the initial visit:

1. Login to the application.
2. Tap Recent Transfers. The Recent Transfers screen appears.
3. Tap the Eyeglasses icon. The Criteria screen appears.

**Figure 6–5 Recent Transfers Criteria Screen**



Field	Description
Status	Limits the orders returned by an order's current status. You can select from a status or any status for which to return results. Valid values include: Any Status (Default), Input, Submitted, Approved, and In Progress. Any Status is the default. It only returns the statuses listed above and will not include closed orders.
Created By	Limits the returned orders by a User ID. You can select one or more User IDs to be applied to the criteria from a list.
Created Date	Limits the returned orders based on the create date for the Purchase Order. Valid values include: Today, Last 2 days, Last 7 days, Last 30 days, and All Dates (Default).
Delivery Date	Defined as the earliest date a transfer can be delivered to a store. Valid values include: Today, Last 2 days, Last 7 days, Last 30 days, and All Dates (Default).
Transfer Type	Limits the returned transfers based on the transfer type.  Valid values include: Any Type (Default), Administrative, AIP Generated Transfer, Book Transfer, Confirmation, Externally Generated, Franchise Order, Franchise Return, Intercompany, Manual Requisition, PO-Linked Transfer, Reallocation Transfer, Return to Vendor, System Generated Transfer, SIM Generated Transfer, and Store Requisition.
Locations	Limits the returned orders to only those that have corresponding items in the specified departments.
Department	Limits the returned transfers to only those that have corresponding items in the specified departments.

The following criteria have the ability to search for specific information:

- Created By
- Locations
- Departments

Tap on the following to access the search capabilities for the choices above:

- All Users
- All Locations
- All Departments

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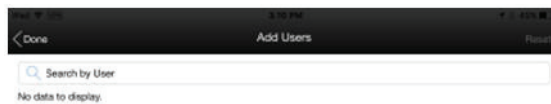
**Note:** It may not be these values always. If you had previously selected one or more values then it will not show as 'All Users' but either the specific user or multiple users for example.

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Add Users is outlined here. The other choices use the same process:

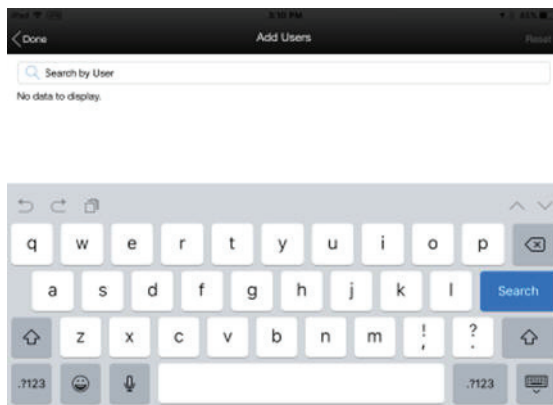
1. Tap the Created By criteria: All Users.
2. Tap Reset. The Add Users screen appears.

**Figure 6–6 Add Users Screen**



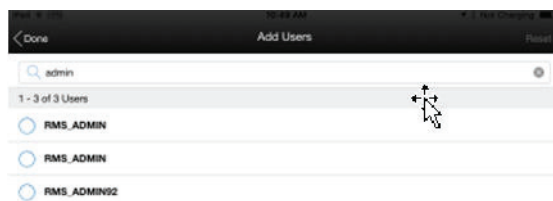
3. Tap anywhere in the Search by User box. The keyboard appears.

**Figure 6–7 Add Users Screen Showing Search by User**



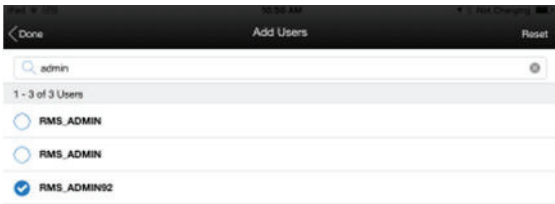
4. Enter all or part of a user name.
5. Tap Search. The Users meeting the criteria appear.

**Figure 6–8 Add Users Screen**



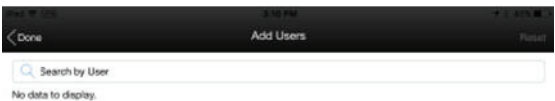
6. Tap the option button for each user you want to include.

Figure 6–9 Recent Transfers Add Users Screen



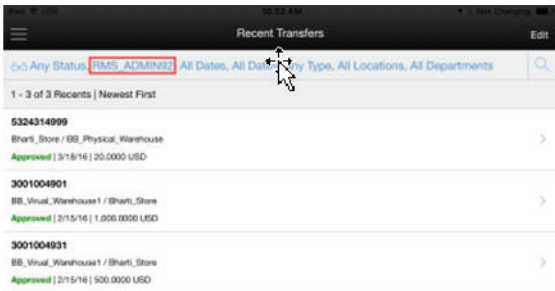
7. Tap **Done**.
8. Optional: To go back to the list of users, tap **Add**. You can add or remove any users in the list. You can also change the search criteria to add users. Any users selected based on the previously entered criteria remain in the list.

Figure 6–10 Add Users Screen



9. Tap **Apply**. The Recent Transfers Criteria screen appears.
10. Tap **Apply** again. The recent transfers for the selected users appear in the list

Figure 6–11 Recent Transfers Screen



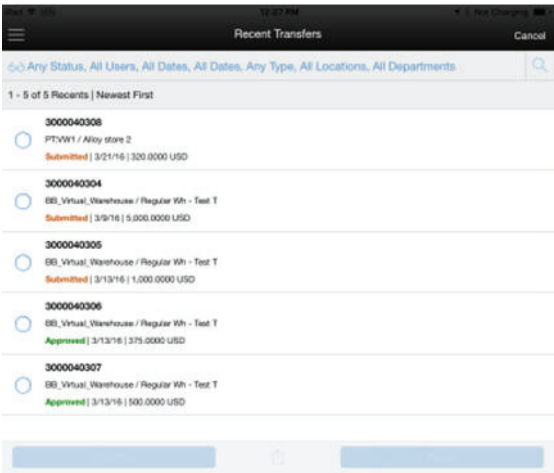
**Magnifying Glass Search:** Tapping on the magnifying glass located below the Edit button will enable a text box for a Search by Transfer ID query where you type in the Transfer ID and conduct a search. This search will re-query the database so it is independent from any filter that is already selected.

## Recent Transfers Screen

The Recent Transfers screen displays a list of Recent Transfers based on specified criteria. The following options are available:

1. Tap **Edit**. Select from the list of available transfers.

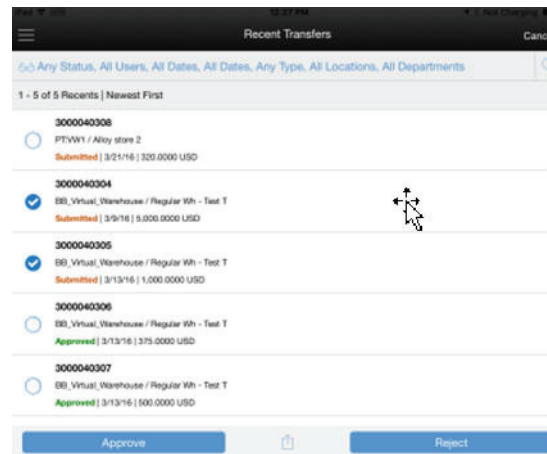
Figure 6–12 Recent Transfers Edit Screen



Field	Description
Transfer Number	Displayed at the top of each transfer in bold.
Supplier Site	Displays the name of the supplier site for the transfer below the order number.
Status	The description of the status of the transfer: <ul style="list-style-type: none"><li>Input</li><li>Submitted</li><li>Approved</li><li>In Progress</li></ul>
Delivery Date	Represents the earliest date that the transfer can be delivered to the store.
Total Cost	The total cost of the transfer in order currency. Example: 10,000.00 USD

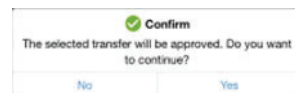
2. Select one or more from the list of available transfers. The Approve, Share, and Reject buttons appear.

**Note:** The Edit button label changes to Cancel. You can cancel the action at any time by tapping Cancel.

**Figure 6–13 Recent Transfers Edit Screen with Selections Made**

## Approve a Transfer

1. To approve selected transfers, tap Approve. The Confirm pop up window appears.

**Figure 6–14 Confirm Pop-up Window**

2. Tap Yes. The transfer is approved.
3. Tap OK to clear the pop up window.

## Reject a Transfer

1. To reject selected transfers, tap Reject. The Confirm pop up window appears.

**Figure 6–15 Confirm Reject Pop-up Window**

2. Tap Yes. The transfer is set back to Input status.
3. Tap OK to clear the pop up window.

## Share a Transfer

The share icon located in the bottom toolbar will enable you to send a summarized view of the selected transfers on this screen via SMS, or e-mail, to a contact. This will allow you to clarify information about the Transfer or provide an explanation for why it cannot be approved in its current state. To share a Transfer:

1. Login to the application.
2. Tap the **Share** icon.
3. Tap either the SMS icon or the E-mail icon.
4. For SMS, enter the mobile number. For E-mail, enter the e-mail address.

5. Tap **Send**.

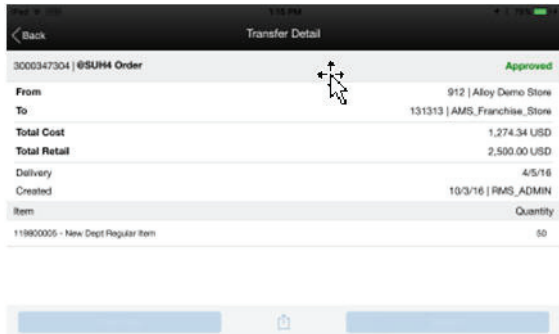
**Note:** For information on e-mail, refer to Chapter 2, [Sending an E-mail](#).

Transfer Details

The Transfer Detail screen displays the transfer details based on your selection from the Recent Transfer screen. To access the transfer details:

1. Tap on any transfer in the transfer list. The Transfer Detail screen appears.

Figure 6–16 Transfer Detail Screen



Area	Description
Header	Displays the following information pertaining to the selected transfer: <ul style="list-style-type: none"><li>■ Order Number</li><li>■ Status</li></ul>
From / To	The From location represents where the goods will be transferred from. The To location represents where the goods will be transferred to.
Transfer Type	Identifies the type or reason for the transfer.
Totals Area	The Total Cost field represents the total cost for the transfer based on the from location currency. The Total Retail field represents the total retail for the transfer based on the from location currency.
Delivery / Created	The Delivery Date field represents the earliest date that the transfer can be delivered to the store. The Create By field represents the Created By identifier. It is the user's RMS user ID. The Created Date field represents the date the transfer was created.
Items Area	This area represents the item(s) on the Transfer. The Item description and number are displayed. The Qty column represents the number of units transferred at an item level. A Load More Rows button located at the end of the item list allows you to scroll to see more items, if applicable.

Area	Description
Actions Area	<p>The Approve button, if enabled, allows you to approve the transfer. Applies only to transfers in Input or Submitted status.</p> <p>The Reject button, if enabled, allows you to reject the Transfer. Applies only to transfers in Submitted status.</p> <p>The Share icon enables you to clarify information about the transfer or provide an explanation for why it cannot be approved in its current state, via SMS or e-mail to a contact.</p>

Order Status	User Privilege	Recent Transfer Options
Input	Approve and Maintain	Approve or Share
Input	Maintain	Share
Input	View	Share
Submitted	Approve and Maintain	Approve, Reject, or Share
Submitted	Maintain	Reject or Share
Submitted	View	Share
Approved	All Privileges	Share
In Progress	All Privileges	Share

