



# Approving + Creating Issues as a Retailer on Proposals

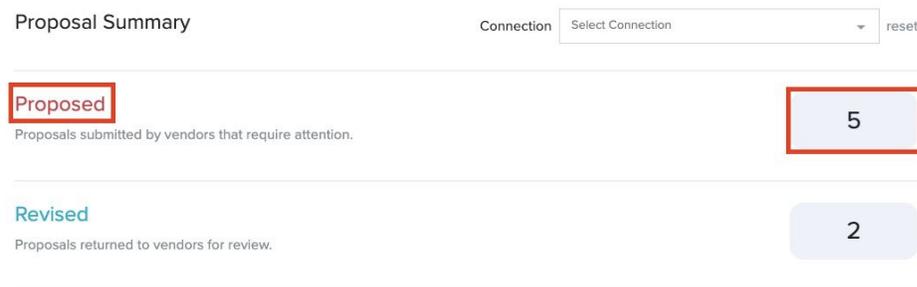
The Merchandising Tool is a great feature for you and your team to utilize, providing full product management of what your vendors submit for approval. Having the ability to not only *approve* proposals but create *issues* against them. Giving you and your team the opportunity to review products, costs and images before going live. Issues can be created against proposed wholesale cost and your retailer product attribute ruleset. (*i.e. long description, short description, decor style, Class, ect* )

## Getting Familiar with the Merchandising Tool

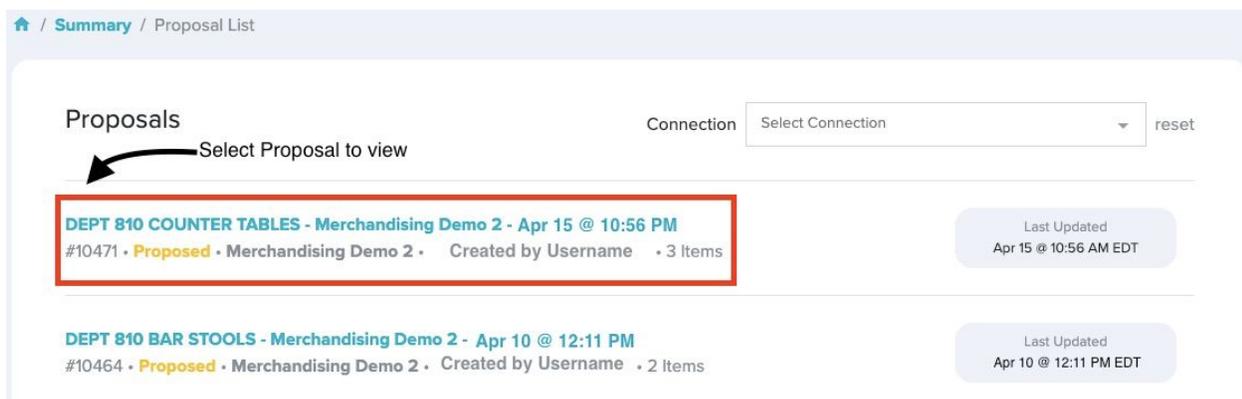


## Part 1: Approving Vendor Proposals

- a. Once a vendor submits a proposal for you and your team to review, the proposal(s) are accessible under the **Proposed** section of the proposal summary screen.
  - i. Click on **Proposed** to access and view all vendor proposals



- b. Select the proposal in which you would like to access and view





- c. Once you are within the individual proposal screen, to view the products on the proposal, click the **Items** button on the left-hand side of the screen

Proposal #10471  
DEPT 810 COUNTER TABLES - Merchandising Demo 2 - Apr 15 @ 10:56 PM  
Proposed • Merchandising Demo 2 • 3 Items

More Actions ▾

Select to view products

Summary  
**Items**  
Issues  
Workflow

Proposal Name [rename](#)  
DEPT 810 COUNTER TABLES - Merchandising Demo 2 - Apr 15 @ 10:56 PM

Merchandising Demo 2 Owner  
Username  
Merchandising Demo 2

Retailer Owner  
Username  
Retailer Name

- d. The screen after clicking on the *Items* button your products view will automatically default to the **Pricing** tab button

- i. Wholesale Cost

If you approve the Wholesale Cost value the vendor submits you can proceed to view all the products and their attributes

- ii. Retail Price

When the vendor initially imports the proposal template, whatever value is applied for this attribute gets auto-matically set and cannot be changed/updated. If the value is incorrect and must be changed/updated, the current proposal will need to be deleted and the vendor will need to create a new proposal with a corrected value for the attribute to update

Proposal #10471  
DEPT 810 COUNTER TABLES - Merchandising Demo 2 - Apr 15 @ 10:56 PM  
Proposed • Merchandising Demo 2 • 3 Items

More Actions ▾

Default View

Summary  
**Items**  
Issues  
Workflow

Actions ▾

SKUs Images Shipping **Pricing** Issues

Cost (Low to High) ▾

Search for items by name or SKU... [Reset](#)

<input type="checkbox"/>	Item	Cost	Price	Margin
<input type="checkbox"/>	 <b>M150040</b> Pure Garden Solar LED Rope Light - 23 Feet - 50 White LED Lights Inventory: 0	\$8.87	\$29.99	68.94%



e. To view the proposed products, click the **SKUs** tab button

Click to view product attributes

Actions ▾ **SKUs** Images Shipping Pricing Issues Cost (Low to High) ▾

Search for items by name or SKU... [Reset](#)

<input type="checkbox"/>	Item	RC Variant ID	Retailer SKU
<input type="checkbox"/>	 2000 x 2000 <b>M150040</b> Pure Garden Solar LED Rope Light - 23 Feet - 50 White LED Lights Inventory: 0	47190	- Not Set -

f. To access and view the product attributes individually, click on the **blue bolded text** (Vendor SKU Number)

Actions ▾ **SKUs** Images Shipping Pricing Issues Cost (Low to High) ▾

Search for items by name or SKU... [Reset](#)

<input type="checkbox"/>	Item	Select	RC Variant ID	Retailer SKU
<input type="checkbox"/>	 2000 x 2000 <b>M150040</b> Pure Garden Solar LED Rope Light - 23 Feet - 50 White LED Lights Inventory: 0		47190	- Not Set -

g. A pop-up will appear, to view the Retailer Ruleset values created against that specific product, click the **Retailer** button on the left-hand side of the pop-up screen

- The Rulesets you and your team require will appear with the values the vendor submitted against
- If you approve the values you can close the pop-up and proceed to review the remaining products

Inspect Item ×

Attributes

Vendor **Tranquil Ceramic Garden Vase - White**  
Vendor SKU : 3924-439

**Retailer**

Select to view Retailer Attributes

Ruleset created by you and your team - communicate with RevCascade Team

[Retailer Name Retailer Ruleset](#) [Save](#)

Pier 1 Imports Retailer Ruleset

**Retailer Name Retailer Attributes**

Subclass	DEPARTMENT NAME	<input type="checkbox"/> remove?
Long Description	PRODUCT LONG DESCRIPTION	<input type="checkbox"/> remove?
PLU Description	PRODUCT SHORT DESCRIPTION	<input type="checkbox"/> remove?
Marketing Description	PRODUCT DESCRIPTION	<input type="checkbox"/> remove?
Instore Date	DATE PRODUCT IS AVAILABLE	<input type="checkbox"/> remove?
Value Strategy	Best	<input type="checkbox"/> remove?

[Close](#)



- h. If you don't have any changes and/or updates for the submitted proposal, click the **Workflow** button on the left-hand side of the Proposal page
- i. Click the **Approve Proposal** button - pop-up to confirm approval.  
Click **Approval Proposal**

**Summary**  
**Items**  
**Issues**  
**Workflow**

Select to proceed to approve proposal

### Proposal Workflow

This page lists the available actions given the current status of this proposal.

Vendor + Retailer Compatibility Check Overview

Current Compatibility Status	
Retailer Name Vendor Ruleset	Passing
Retailer Namer Retailer Ruleset	Passing

Check the Items tab to review failing items.

Current Issue Status	
Open	0
Resolved	0
Closed	0

Click once ready to approve

**Return Proposal**

Select this option to return this proposal to the vendor for review and/or changes.

**Approve Proposal**

Select this option to approve this proposal and proceed to pricing approval.

.....Go to next page for Part 2 : Creating Issues against Vendor Proposals.....



## Part 2 : Creating Issues

- a. Once a vendor submits a proposal for you and your team to review, the proposal(s) are accessible under the **Proposed** section of the proposal summary screen.
  - i. Click on **Proposed** to access and view all vendor proposals

Proposal Summary Connection  reset

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**Proposed** 5  
Proposals submitted by vendors that require attention.

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Revised 2  
Proposals returned to vendors for review.

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- b. Select the proposal in which you would like to access and view

Proposals Connection  reset

Select Proposal to view

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**DEPT 810 COUNTER TABLES - Merchandising Demo 2 - Apr 15 @ 10:56 PM**  
#10471 • Proposed • Merchandising Demo 2 • Created by Username • 3 Items Last Updated  
Apr 15 @ 10:56 AM EDT

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**DEPT 810 BAR STOOLS - Merchandising Demo 2 - Apr 10 @ 12:11 PM**  
#10464 • Proposed • Merchandising Demo 2 • Created by Username • 2 Items Last Updated  
Apr 10 @ 12:11 PM EDT

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- c. Once you are within the individual proposal screen, to view the products on the proposal, click the **Items** button on the left-hand side of the screen

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Select to view products

Summary **Items** Issues Workflow

Proposal Name [rename](#)  
DEPT 810 COUNTER TABLES - Merchandising Demo 2 - Apr 15 @ 10:56 PM

**Merchandising Demo 2 Owner** **Retailer Owner**

Username Merchandising Demo 2 Username  
Retailer Name



d. The screen after clicking on the *Items* button your products view will automatically default to the **Pricing** tab button

Default View

Summary  
Items  
Issues  
Workflow

Actions

SKUs Images Shipping Pricing Issues

Cost (Low to High)

Search for items by name or SKU... Reset

Item	Cost	Price	Margin
<input type="checkbox"/>  <b>M150040</b> Pure Garden Solar LED Rope Light - 23 Feet - 50 White LED Lights Inventory: 0	\$8.87	\$29.99	68.94%

ii. Wholesale Cost

If you wish to submit a revision to the vendors Wholesale Cost, you will want to follow the below steps:

**Step 1:** Select the product you wish to change the Wholesale Cost

**Step 2:** Use the **Actions** drop-down menu - Click **Adjust Costs...**

**Step 3:** Select the *Adjustment Type*

- a. Set To Value
- b. Adjust by Percentage
- c. Adjust by Fixed Amount
- d. Adjust Cents

**Step 4:** Enter new value

Adjust Costs

Adjustment Type \*

Set to Value

New Value \*

9.00

Adjust Costs

Actions

- Review Vendor Attributes...
- Edit Retailer Attributes...
- Create Issue...
- Add to Open Issue...
- Adjust Costs...
- Adjust Prices...
- Remove Items...



### iii. Retail Price

When the vendor initially imports the proposal template, whatever value is applied for this attribute gets auto-matically set and cannot be changed/updated. If the value is incorrect and must be changed/updated, the current proposal will need to be deleted and the vendor will need to create a new proposal with a corrected value for the attribute to update

e. To view the proposed products, click the **SKUs** tab button

Proposal #10471  
DEPT 810 COUNTER TABLES - Merchandising Demo 2 - Apr 15 @ 10:56 PM  
Proposed • Merchandising Demo 2 • 3 Items

More Actions ▾

Summary  
Items  
Issues  
Workflow

Actions ▾ **SKUs** Images Shipping Pricing Issues Cost (Low to High) ▾

Click to view product attributes

Search for Items by name or SKU... Reset

<input type="checkbox"/>	Item	RC Variant ID	Retailer SKU
<input type="checkbox"/>	 Pure Garden Solar LED Rope Light - 23 Feet - 50 White LED Lights Inventory: 0 2000 x 2000	47190	- Not Set -

f. To access and view the product attributes individually, click on the **blue bolded text** (Vendor SKU Number)

Actions ▾ **SKUs** Images Shipping Pricing Issues Cost (Low to High) ▾

Search for items by name or SKU... Reset

<input type="checkbox"/>	Item	Select	RC Variant ID	Retailer SKU
<input type="checkbox"/>	 Pure Garden Solar LED Rope Light - 23 Feet - 50 White LED Lights Inventory: 0 2000 x 2000	<b>M150040</b>	47190	- Not Set -

g. A pop-up will appear, to view the Retailer Ruleset values created against that specific product, click the **Retailer** button on the left-hand side of the pop-up screen

Inspect Item

Attributes  Pure Garden Solar LED Rope Light - 23 Feet - 50 White LED Lights  
Vendor SKU: M150040

Vendor **Retailer**

Ruleset created by you and your team - communicate with RevCascade Team Save

Pier 1 Retailer Ruleset (SB)  
Pier 1 Imports Retailer Ruleset

Pier 1 Retailer Attributes

Subclass	DEPARTMENT NAME	<input type="checkbox"/> remove?
Long Description	PRODUCT LONG DESCRIPTION	<input type="checkbox"/> remove?
PLU Description	PRODUCT SHORT DESCRIPTION	<input type="checkbox"/> remove?
Marketing Description	PRODUCT DESCRIPTION	<input type="checkbox"/> remove?
Instore Date	DATE PRODUCT IS AVAILABLE	<input type="checkbox"/> remove?
Value Strategy	Best	<input type="checkbox"/> remove?

Select to view Retailer Attributes



- i. The Rulesets you and your team require will appear with the values the vendor submitted against
- ii. If you do not approve of the values the vendor applied to the product you will need to **Create an Issue** by following the below steps (same as changing cost)

**Step 1:** Select the product you wish to change the Wholesale Cost

**Step 2:** Use the **Actions** drop-down menu

**Step 3:** Click **Create Issue...**

**Step 4:** Create Issue against desired product attributes

h. Once you are ready to submit your proposal back to the vendor for review

i. Click the **Workflow** button on the left-hand side of the Proposal page

j. Click **Return Proposal**

The screenshot shows the 'Proposal Workflow' page. On the left, a navigation menu has 'Workflow' highlighted with a red box and an arrow pointing to it. Below the menu, text says 'Select to proceed to submit proposal to vendor for revision'. The main content area is titled 'Proposal Workflow' and includes a sub-header 'This page lists the available actions given the current status of this proposal.' Below this are two panels: 'Current Compatibility Status' and 'Current Issue Status'. The 'Current Compatibility Status' panel shows two rows: 'Retailer Name Vendor Ruleset' with status 'Passing' and 'Retailer Namer Retailer Ruleset' with status 'Passing'. Below this panel is a red box containing the 'Return Proposal' button. The 'Current Issue Status' panel shows a table with columns for status and count: 'Open' (0), 'Resolved' (0), and 'Closed' (0). Below this panel is a blue box containing the 'Approve Proposal' button. Arrows point from the 'Return Proposal' button to the 'Current Issue Status' panel and from the 'Approve Proposal' button to the 'Current Issue Status' panel. Text above the 'Approve Proposal' button says 'Vendor + Retailer Compatibility Check Overview'. Below the 'Return Proposal' button, text says 'Select this option to return this proposal to the vendor for review and/or changes.' Below the 'Approve Proposal' button, text says 'Select this option to approve this proposal and proceed to pricing approval.'

**Summary**

**Items**

**Issues**

**Workflow**

Select to proceed to submit proposal to vendor for revision

### Proposal Workflow

This page lists the available actions given the current status of this proposal.

**Current Compatibility Status**

Retailer Name Vendor Ruleset	Passing
Retailer Namer Retailer Ruleset	Passing

Check the Items tab to review failing items.

**Current Issue Status**

Open	0
Resolved	0
Closed	0

Click once ready to submit to vendor for revision

**Return Proposal**

Select this option to return this proposal to the vendor for review and/or changes.

**Approve Proposal**

Select this option to approve this proposal and proceed to pricing approval.

Vendor + Retailer Compatibility Check Overview