

ORACLE TRADE MANAGEMENT

KEY FEATURES

- Complex Volume pricing capabilities
- Promotional Lift Prediction and Baseline Calculation
- Multiple Organization Access Control for claims and deductions
- Enhanced Vendor Rebate flows
- Trade Planning and Execution
- Support for all claims – claim, deduction, debit claim, overpayment, promotional and operational
- Budget by product, brand, customer, geography, territory, category
- Indirect sales management & chargeback
- Extensive integration across the E-Business Suite

Oracle® Trade Management is the application that administers trade spending programs for maximum return. Closed-loop planning / execution / analysis tools and solutions enables companies to optimize the execution and impact of trade promotions across the entire demand chain. Trade Management is a key component of the Oracle Customer Relationship Management solution, the integrated suite that drives profitable customer interaction.

Easily Manage Complex Accruals and Pricing

Companies are under ever-increasing pressure to get the highest return from promotional spending. But because trade management is an enterprise-wide process, companies need more than just a standalone promotion system to effectively administer trade programs. Oracle Trade Management administers the entire promotion cycle, from trade planning all the way to claim settlement. Account planning and analysis tools streamline the process. Real-time tracking and monitoring mechanisms keep trade spending in compliance with budget and regulatory constraints. Claim settlement features slash processing time and costs, while reducing and resolving customer disputes. As a component of Oracle’s CRM and the Oracle E-Business Suite, Trade Management integrates with all related processes—from order management, to receivables and payables, to general ledger.



Figure1: Oracle Trade Management makes it easy to plan, monitor and settle promotions.

Simplify Trade Planning

Oracle Trade Management brings structure and visibility to the challenge of planning increasingly complex trade programs. Tight budgets and increasing compliance demands require rigorous budget processes. Oracle Trade Management

combines powerful budget allocation with robust trade fund execution capabilities for Market Development programs (MDF), co-op advertising, and other accrual or promotional activities. Organizations can control discretionary spending dollars by designating specific product, brand, and marketplace allocations, thus ensuring that promotional funds are used as intended.

Ever-increasing customer pressure on pricing and promotions often make it difficult for trade managers to develop mutually profitable business relationships. Oracle Trade Management provides robust account planner that enables building more profitable channel relationships. Establish sales targets, create comprehensive account plans, and schedule promotions for each account. Plans can be created for different calendar periods and can be detailed down to the customer, distributor, and retail store level. Plan details can be rolled up the sales hierarchy, so that sales management has visibility into all customer activities. Sales analysis, retail pricing monitors, ROI & discount calculators, and a 360-degree view of each account enable sales agents to build more profitable relationships.

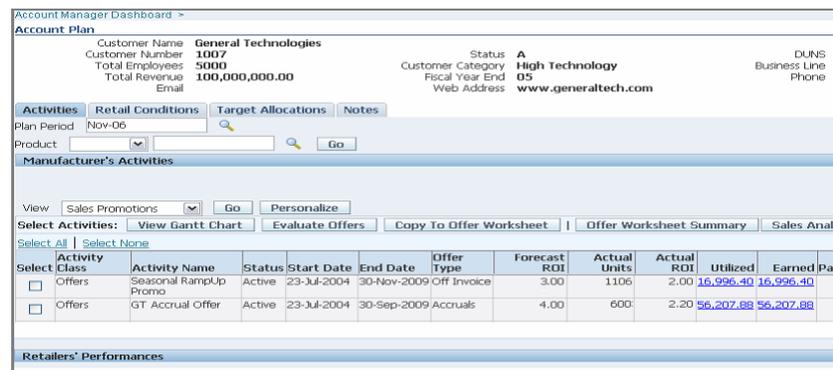


Figure2: The Account Planner allows trade managers to establish & maintain profitable channel relationships

Past results are one of the most reliable predictors of future success. Trade Management's offer evaluator analyzes historical data to help you plan the most effective promotional offers and customer product mixes. The offer evaluator analyzes the investments and returns of past promotions. With this information, sales agents can present the ideal promotions tailored to the customer's account plan and performance requirements.

Control Promotional Spending

Oracle Trade Management provides real-time tools to track execution and reign in out-of-control spending. A real-time view into customer commitments and liabilities is key to preventing overspending. With Oracle Trade Management, sales management can view the planned spending, committed liabilities, customer earnings, and paid levels of discretionary sales dollars. Accurately capturing promotional expenses and liabilities lets you supply timely information to your financial system, reducing the risk of accounting discrepancies or surprises. With Oracle Trade Management, you always know what commitments you have made and their impact on total budget.

Comprehensive Deduction Management

Oracle Trade Management reduces both the transaction costs of settling claims and the hidden costs of deductions. Without automation, resolving claims is a slow process. Oracle Trade Management provides a central repository of all claims and deductions to claim analysts, giving them easy access to the information they need to resolve claims quickly, and to give management full visibility into outstanding claims and deductions. With claims organized by type and reasons, your organization can identify inefficient operational procedures and take corrective measures as well as identify invalid claims more easily and pay valid ones promptly. Complete customer information on available funds, related activities, and past transactions slashes resolution time for both claims and deductions.

Researching claims is crucial to identify invalid claims, thus avoiding over-aggressive customer deductions, but rigorous validation can be so time-consuming that not every claim receives the scrutiny it deserves. Oracle Trade Management provides a research workflow that makes validation fast and accurate. The system routes claims to appropriate staff by type, amount, territory, and other key parameters. Assisted matching makes it easy to tie claims to the correct promotions. The system helps users detect duplicates, associate budget earnings, and verify performance compliance. Aging and task management track and escalate claims before they become customer satisfaction problems.

Tight integration between claims processing and back-end financial systems greatly reduces settlement costs and cycle time. Oracle Trade Management integrates resolution of deductions and claims with accounts-payable and receivable systems and validates that the correct general ledger accounts are assigned. Properly approved claims automatically spawn payments and credits in Oracle Payables and Receivables. Workflow can be easily configured to automate custom settlement procedures.

Select Customer	Earned	Paid	Balance	Open Claims	Year Ago Earned	Last Year Total
<input type="checkbox"/> Department of Defense	0.00	0.00	0.00	19,328.27	0.00	
<input type="checkbox"/> Knoxville Family Clinic	0.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/> A. C. Networks	275.00	0.00	275.00	0.00	0.00	
<input type="checkbox"/> SmartBuy	0.00	0.00	0.00	239,687.16	0.00	
<input type="checkbox"/> Bigmart	0.00	0.00	0.00	17,071.22	0.00	
<input type="checkbox"/> Twinstown Food Supply	0.00	0.00	0.00	1,000.00	0.00	
<input type="checkbox"/> Allgoods Department Stores	0.00	0.00	0.00	7,313.73	0.00	
<input type="checkbox"/> Discount Super Store	0.00	0.00	0.00	236,580.94	0.00	
<input type="checkbox"/> Bay Circle Systems	0.00	0.00	0.00	1,304.99	0.00	
<input type="checkbox"/> Infinite Loop Corporation	0.00	0.00	0.00	6,311.22	0.00	
Grand Total	275.00	0.00	275.00	1,117,509.00	0.00	36,330.00

Figure3: Customer checkbook tracks liabilities and open claims from customers

Effectively Process and Manage POS Data

Promotions based on indirect sales in multi-tiered distribution channels are time-consuming, expensive to process, and difficult to audit and control. Oracle Trade Management’s Point of Sale data management provides automatic import of POS

KEY BENEFITS

THE KEY BENEFITS OF TRADE MANAGEMENT INCLUDE:

- Closed loop trade promotions solution
- Plan and analyze trade promotions effectively
- Control promotional expenses and liability
- Extensive ERP and CRM Integration
- Management of complex customer relationships
- Reduce days outstanding for deductions
- Reduce claim costs
- Effectively manage, process and analyze Point Of Sales Data

RELATED PRODUCTS:

- Advanced Pricing
- Accounts Receivable
- Partner Management
- Marketing

RELATED SERVICES:

The following services are available from Oracle Support Services:

- Oracle E-Business Suite Accelerators
- Oracle On-Demand
- Product Support Services
- Update Subscription Services
- Oracle Consulting Services

data. Not only does this slash the time and expense of processing distributor claims, it gives your organization a combined view of all direct and indirect rebates. Out of the box, Oracle Trade Management supports for some key business flows like Chargeback common in Life Sciences industry, the Ship and Debit flow that is common in the High Tech and the Semi Conductor Industry.

The system addresses four critical areas related to the effective processing of these flows: POS data load, data validation, dispute handling and claim settlement. At each process step, the organization has a real-time view of all relevant information that enables facts-based decision-making and collaboration resulting into reduced errors and improved efficiency.

The screenshot shows the 'Indirect Inventory Tracking' window with 'UCM = Each'. It features a table with columns for 'Select', 'Business World', 'Start Date', 'End Date', 'Beginning Inventory', 'Inventory In', 'Inventory Out', 'Adjustment', and 'Ending'. The table lists various distributors such as Business World, Imaging Innovations, Inc., Total Internet, Hillman and Associates, SmartBuy, AT&T Universal Card, American Telephone & Telegraph, Modern Truck, A.C. Networks, and Federal Parts. A 'Grand Total' row at the bottom shows: Beginning Inventory 1233742, Ending Inventory 958302, Inventory In 2759136, Inventory Out 3044576, and Adjustments 10000.

Figure 4: Indirect inventory tracking uses POS data to provide a complete sell-through view of multi-tier trade programs

Oracle Trade Management’s indirect inventory-control tool facilitates audits of customer/distributor inventory by providing data to analyze inventory and stock movement as well as promotion effectiveness by category, item and distributor.

Oracle E-Business Suite—The Complete Solution

Oracle E-Business Suite enables companies to efficiently manage customer processes, manufacture products, ship orders, collect payments, and more—all from applications that are built on unified information architecture. This information architecture provides a single definition of your customers, suppliers, employees, and products—all important aspects of your business. Whether you implement one module or the entire Suite, Oracle E-Business Suite enables you to share unified information across the enterprise so you can make smarter decisions with better information.

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