

Oracle® Retail Store Inventory Management

User Guide

Release 15.0.3

F18544-01

May 2019

Primary Author: Bernadette Goodman

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Contents

Send Us Your Comments	xxi
Preface	xxiii
Audience	xxiii
Documentation Accessibility	xxiii
Related Documents	xxiii
Customer Support	xxiii
Review Patch Documentation	xxiv
Improved Process for Oracle Retail Documentation Corrections	xxiv
Oracle Retail Documentation on the Oracle Technology Network	xxiv
Conventions	xxiv
1 Oracle Retail Store Inventory Management	
2 Using SIM	
Log In, Log Out, and Exit SIM	2-1
Log In to SIM	2-2
Log Out of SIM	2-2
Exit SIM	2-2
Select a SIM Store	2-2
Change Your SIM Password	2-3
Use Standard SIM Interface Controls	2-4
SIM Status Display	2-4
Use a Drop-Down List to Select Field Values	2-5
Select Multiple Options from a List	2-5
Use Standard SIM Buttons	2-5
Use the Calendar to Select a Date	2-6
Edit Text for Long Text Fields	2-7
Use Navigation and Shortcut Keys	2-7
Field Navigation Keys	2-8
Button Shortcut Keys	2-8
Jump to Another Functional Area Using Quick Jump	2-8
Scan an Item (Scanner Button)	2-10
Access Online Help	2-11
Help Tabs	2-11

Help Navigation.....	2-12
Set User Preferences.....	2-12
Set Table View Preferences.....	2-12
Set Text Size (Size Content).....	2-13
Set Gridline Display.....	2-14
View or Change Text Size and Gridlines Settings.....	2-14
Control Which Columns Are Displayed.....	2-14
Sort a Table by One Column.....	2-15
Sort a Table by Multiple Columns.....	2-16
Select a Display Theme.....	2-17
Print or View SIM Reports and Other Output.....	2-18
View Client Information.....	2-20
Configure Client Logging.....	2-21

3 Product Groups

Product Group Types.....	3-2
Counting Methods for Stock Counts.....	3-4
Filter the Product Group List.....	3-5
Create a Product Group.....	3-6
Enter Product Group Detail.....	3-7
Enter Ticketing Detail.....	3-9
Enter Item Request Detail.....	3-9
Enter Replenishment Detail.....	3-9
Enter Wastage Detail.....	3-10
Enter Stock Count Detail.....	3-10
Define Product Group Components.....	3-12
Edit a Product Group.....	3-14
Delete a Product Group.....	3-14
Product Group Size Limits.....	3-15
Automatic Breakdown of Large Product Groups.....	3-15
Child Descriptions.....	3-15
Example.....	3-16

4 Product Group Scheduler

Filter the Product Group Schedule List.....	4-2
Create a Product Group Schedule.....	4-4
Edit a Product Group Schedule.....	4-5
Delete a Product Group Schedule.....	4-5

5 Unique Identification Numbers (UIN)

Set Up UIN Attributes.....	5-2
UIN Resolution List.....	5-4
Filter the UIN Resolution List.....	5-5
View History and Update UIN Status.....	5-6
Mark UIN Exceptions Resolved.....	5-7
Updating UINs.....	5-7

Item Lookup by UIN.....	5-9
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6 Security

User Maintenance	6-1
Filter the User List.....	6-2
Create a New User	6-4
Assign a User Password.....	6-5
Assign Stores to a User.....	6-5
Assign Roles to a User.....	6-6
Assign Groups to a User	6-7
Copy Assignments from Another User	6-8
Update a User	6-8
Delete a User	6-9
Mass Assign Stores	6-9
Mass Assign Roles	6-11
Role Maintenance	6-12
Filter the Role List	6-13
Create a New Role.....	6-14
Edit or View an Existing Role.....	6-17
Delete a Role	6-17
Password Configuration	6-18

7 Technical Maintenance

Configure the User Interface	7-1
Create a Theme	7-2
Customize Interface Fonts	7-4
Change Fonts	7-4
Reset Fonts	7-6
Apply a Universal Font Setting.....	7-6
Customize Interface Colors	7-6
Change Colors	7-7
Reset Colors	7-10
Customize Interface Icons.....	7-10
Change Icons.....	7-10
Reset Icons.....	7-12
Activate or Deactivate a Theme	7-12
Modify Translations.....	7-12
Create New Translations.....	7-15
Polling Timers	7-16
Stop or Start an MPS Working Type	7-17
Refresh the MPS Working Type List Display	7-18
Configure a MPS Working Type.....	7-18
MPS Staged Messages	7-18
Filter the MPS Staged Message Lookup List.....	7-20
View and Edit MSP Staged Messages	7-20
Delete MPS Staged Messages	7-21

Refresh the MPS Staged Message Lookup List.....	7-21
Reset MPS Staged Messages.....	7-22

8 Setup/Print Setup

SIM Stores	8-1
Add or Remove Buddy Stores.....	8-2
Auto-Receive Stores.....	8-3
SIM Managed Stores.....	8-4
Store Administration	8-5
Store Defaults Administration	8-6
System Administration	8-7
Inventory Adjustment Reason Maintenance	8-8
Add an Inventory Adjustment Reason Code.....	8-9
Edit an Inventory Adjustment Reason Code.....	8-11
Delete Inventory Adjustment Reason Codes.....	8-11
Shipment Reason Maintenance	8-12
Add a Shipment Reason Code.....	8-12
Edit a Shipment Reason Code.....	8-13
Delete Shipment Reason Codes.....	8-13
Tolerances	8-13
Customer Order Picking Tolerances.....	8-14
Set Tolerances for Ad Hoc Stock Counts and Customer Order Picking.....	8-14
Extended Attributes Setup	8-15
Attributes Setup.....	8-15
Assign Attributes.....	8-16
Print Setup	8-18
Change Printer Properties.....	8-18
Delete a Printer.....	8-19
Print Formats.....	8-19
Add a Format.....	8-20
Change a Format.....	8-21
Delete a Format.....	8-22
Hierarchy Format.....	8-22
Add a Hierarchy Format Assignment.....	8-23
Change a Hierarchy Format Assignment.....	8-24
Delete a Hierarchy Format Assignment.....	8-24
UDA Print Setup.....	8-25
Select the UDAs to List.....	8-25
Specify Whether Tickets or Labels Are Printed Automatically.....	8-25
Add a Printer.....	8-26

9 DSD Receiving

Filter the DSD Receiving List Window	9-3
Enter Extended Attributes	9-11
Adjust a Delivery	9-12
Print a Delivery Receipt	9-13

10 Transfers

Transfer	10-1
Filter the Transfer List	10-3
Look Up a Promotion	10-4
Request a Transfer.....	10-5
Create a Transfer	10-8
Edit a Transfer or Transfer Request.....	10-11
Add and Remove Items	10-11
Set the Not After Date and Authorization Number	10-11
Respond to a Transfer Request	10-11
Accept a Transfer Request Without Changes	10-12
Accept a Transfer Request With Changes	10-12
Reject a Transfer Request.....	10-13
Approve a Transfer	10-13
Delete a Transfer	10-13
Close the Transfer	10-14
View a Transfer	10-15
View Transfer Information	10-16
View Item Details.....	10-16
Print a Transfer.....	10-17
Transfer Shipment	10-18
Filter the Transfer Shipment List	10-20
Create a Transfer Shipment	10-21
Edit a Transfer Shipment	10-23
Add Containers to a Shipment.....	10-24
Add an Authorization Number to a Shipment.....	10-24
View Customer Order Information in the Shipment.....	10-24
Prepare a Bill of Lading.....	10-25
Print a Bill of Lading.....	10-26
Adjust a Carrier after Manifesting.....	10-26
Dispatch a Transfer Shipment	10-28
Delete a Transfer Shipment	10-29
Create or Edit a Container	10-29
Select Transfer Documents for the Container	10-30
Limit a Container by Merchandise Hierarchy	10-32
Select Unavailable Inventory	10-32
Add Items without a Transfer.....	10-32
Remove Items	10-32
Enter Item Extended Attributes	10-32
Enter Item UINs	10-33
Create a Container Label.....	10-33
Enter the Container ID, Tracking ID, Package Type, and Weight.....	10-33
Print a Container Label	10-34
Confirm a Container	10-34
Adjust a Completed Container	10-35
Delete a Container.....	10-35
Transfer Receiving	10-35

Filter the Transfer Receiving List	10-37
Look Up a Promotion	10-39
Look Up a Customer Order	10-40
Create or Edit a Transfer Receipt	10-40
Default Quantities on All Containers.....	10-41
Identify the Carrier Details	10-41
Receive Unexpected Containers.....	10-42
Create an Empty Container	10-42
Copy a Misdirected Container	10-42
View Customer Order Information in the Delivery.....	10-42
Confirm a Transfer Receipt.....	10-43
Delete a Transfer Receipt	10-43
Print a Transfer Receipt.....	10-43
Edit a Container.....	10-44
Add an Unexpected Item.....	10-45
Default all Item Quantities	10-45
Clear all Item Quantities	10-45
Remove an Item.....	10-46
Correct a Discrepant Item	10-46
Record the Container Reference Number	10-46
Move Inventory to the Shop Floor	10-47
Enter the Tracking ID and SSCC Barcode	10-47
Enter Item Extended Attributes	10-47
Enter Item UINs	10-48
Damage an Item	10-48
Enter the Damage Quantity	10-48
Default the Damage Quantity for the Remaining Items	10-48
Enter a Damage Reason Code	10-49
Confirm a Container	10-49
Adjust a Received Container	10-49
Delete a Container.....	10-49
Print a Discrepant Item Report	10-50

11 Return to Vendor

RTV	11-1
Filter the RTV List	11-3
Create an RTV	11-4
Edit or View an RTV	11-6
Update UINs for a Return.....	11-7
Print a Return Report.....	11-7
Delete an RTV	11-8
RTV Shipment	11-8
Filter the RTV Shipment List	11-10
Create an RTV Shipment.....	11-11
Edit or View an RTV Shipment.....	11-15
Dispatch a Return.....	11-16
Print a Bill of Lading.....	11-16

Delete an RTV Shipment.....	11-16
12 Inventory Adjustments	
Filter the Inventory Adjustment List.....	12-2
Create an Inventory Adjustment Template.....	12-3
Create a Template.....	12-4
Edit a Template.....	12-5
Delete a Template.....	12-6
Create an Inventory Adjustment.....	12-6
Enter UINs for an Inventory Adjustment.....	12-8
Edit an In-Progress Inventory Adjustment.....	12-8
Print an Inventory Adjustment Report.....	12-9
13 Sequencing	
Add a Location.....	13-2
Edit a Location.....	13-3
Delete Locations.....	13-4
Look Up Location Details for an Item.....	13-4
Add a Location for an Item.....	13-5
Edit Location Information for an Item.....	13-6
Delete Locations for an Item.....	13-7
Assign Unassigned Items to a Location.....	13-8
Filter the No Location List.....	13-8
Add an Item to a Location.....	13-9
Edit Items at a Location.....	13-10
Delete Items from a Location.....	13-11
Print Shelf Edge Labels.....	13-12
14 Stock Counts	
Using the Stock Counts Interface.....	14-2
Stock Count List Window.....	14-3
Child Stock Count List Window.....	14-5
Stock Count Detail Window.....	14-7
Stock Re-Count Detail Window.....	14-8
Stock Count Authorization Window.....	14-10
Enter Extended Attributes.....	14-12
View Count Detail.....	14-13
Filter the Stock Count List.....	14-13
View Future Stock Counts.....	14-14
Print or Export a Stock Count Report.....	14-16
Stock Count Detail Report.....	14-16
Stock Count Export Report.....	14-16
Execute a Stock Count.....	14-16
Take a Snapshot.....	14-17
When Snapshots Are Taken.....	14-17
Take the Count Snapshot.....	14-18

Snapshots for Recounts	14-18
Unique Identification Numbers (UIN) Status on Snapshots	14-19
View Product Group Details	14-19
Enter Stock Count Results	14-20
Enter Recount Results	14-21
Update UINs for a Count	14-22
Complete a Child Stock Count	14-22
Authorize a Stock Count	14-23
Update Authorized Quantities Manually	14-24
Filter the Stock Count Authorization List	14-26
Other Methods to Update Authorized Quantities	14-27
Update UINs before Authorizing	14-30
View and Update Rejected Items	14-32
Reasons for Rejection	14-32
View and Update Rejected Items	14-33
Delete Stock Counts	14-35
Stock Count Status	14-36
Stages and Statuses	14-36
Actions That Change Stock Count Type and Status	14-37
Master Stock Counts	14-37
Child Stock Counts	14-38

15 Shelf Replenishment

Filter the Shelf Replenishment List	15-2
Create a Shelf Replenishment List	15-4
Enter Shelf Replenishment List Quantities	15-5
Substitute an Item for Shelf Replenishment	15-6
Print a Shelf Replenishment List Report	15-7
Delete a Pending Shelf Replenishment List	15-7

16 Item Requests

Filter the Item Request List	16-2
Request an Item	16-2
Edit an Item Request	16-4
Delete Item Requests	16-5

17 Price Changes

Filter the Price Change List	17-2
Create a Price Change Request	17-3
Edit a Price Change	17-4

18 Item Tickets

Filter the Item Ticket List	18-2
Print Tickets	18-3
Item Ticket Detail	18-4
Update Tickets	18-4

Update Ticket Format	18-5
Refresh Ticket Quantity.....	18-5
Delete Tickets.....	18-5
Item Ticket Batch List Window	18-6
Filter the Item Ticket Batch List	18-7
Print Tickets	18-8
Create Ticket Batch	18-8
Update Ticket Batch.....	18-10
Update Ticket Format.....	18-11
Refresh the Ticket Quantity	18-11
Delete Ticket Batches	18-11
Item Ticket Batch Detail - Manual	18-11
Create Tickets	18-13
Select UINs	18-15
Additional Attributes Entry	18-16
Print Tickets for Auto-Generated SNs	18-16
Session Printer Setup	18-17
Reports.....	18-18

19 Store Orders

Filter the Store Orders List	19-2
Create a Store Order	19-3
View Item Details	19-4
Look Up Item Deals	19-4
View Item Orders	19-5
View Item Sales	19-6
View or Edit a Store Order	19-6
Approve a Store Order	19-7
Cancel a Store Order	19-7
Print a Store Order Report	19-8

20 Lookups

View Customer Orders	20-1
Item Lookup	20-2
View Primary Supplier Details	20-5
View the Number of Component Items in Each Pack (Pack Items Only)	20-5
View the Pack Items for a Component Item	20-6
View the Non-Sellable Inventory.....	20-6
View Inventory Available in Buddy Stores (Stock Locator).....	20-7
View Planned Deliveries	20-7
View Current Pricing Information	20-8
View Related Items	20-8
View UDA Detail	20-9
View UIN Detail.....	20-9
View History and Update UIN Status	20-11
Print Tickets	20-12

View Item Images.....	20-12
Print an Item Report	20-13
Supplier Lookup	20-13
Container Lookup	20-14
Finisher Lookup	20-16
Transaction History	20-18
View a Transaction History	20-19

21 Customer Order Management

Filter the Customer Order Management List	21-1
View a Customer Order	21-3
Create a Customer Order Pick List	21-5
Delete a Customer Order Pick List	21-6
Print a Customer Order Pick List	21-6
Create a Customer Order Pick List	21-6
Enter Pick Details	21-7
Substitute an Item for Customer Order Pick	21-8
Confirm a Customer Order Pick	21-9
Create a Customer Order Delivery	21-9
Create a Reverse Pick	21-13

List of Figures

2-1	SIM Login Window	2-1
2-2	SIM Main Menu.....	2-2
2-3	Current Store	2-2
2-4	Change Store window	2-3
2-5	Change Password Window	2-4
2-6	Status Display	2-4
2-7	Calendar Window.....	2-6
2-8	Text Editing Window	2-7
2-9	Quick Jump Window.....	2-9
2-10	Advanced Item Entry window	2-11
2-11	Help Tabs	2-12
2-12	Table Configuration Window - General Tab	2-14
2-13	Table Configuration Window - Columns Tab	2-15
2-14	Table Configuration Window - Columns Tab	2-17
2-15	Client Information Window	2-18
2-16	Report Selection Window	2-19
2-17	Oracle BI Publisher Report Output	2-19
2-18	Client Information Window	2-20
3-1	Product Group List Window.....	3-1
3-2	Product Group Filter Window	3-6
3-3	Product Group Detail Window – Product Group Attributes Tab	3-8
3-4	Product Group Detail Window – Product Group Components Tab	3-13
4-1	Product Group Schedule List Window.....	4-2
4-2	Product Group Schedule Filter Window	4-3
5-1	UIN Attributes Window	5-3
5-2	UIN Resolution List Window.....	5-4
5-3	UIN Resolution Filter Window	5-5
5-4	UIN History Window.....	5-6
5-5	UIN Quantity Field Window	5-8
5-6	UIN Window	5-8
5-7	Item Lookup Window	5-10
5-8	Inventory Adjustment Detail Window	5-10
5-9	Select Item Window	5-11
6-1	User List Window	6-2
6-2	User Filter Window	6-3
6-3	User Detail Window	6-4
6-4	Assign Password Window	6-5
6-5	Store Assignments Window	6-5
6-6	Role Assignments Window	6-6
6-7	Group Assignments Window	6-7
6-8	User Lookup Window.....	6-8
6-9	Mass Assign Stores Window.....	6-10
6-10	Mass Assign Roles Window	6-11
6-11	Role List Window	6-13
6-12	Role Filter Window.....	6-14
6-13	Role Detail Window – Create Role.....	6-15
6-14	Data Permissions Window	6-16
6-15	Role Detail Window – Edit Role	6-17
6-16	Password Configuration Window.....	6-19
7-1	Available Themes Window	7-3
7-2	Custom Theme Selection Window	7-3
7-3	Font Detail Window	7-4

7-4	Customize Font Window	7-5
7-5	Color Detail Window	7-7
7-6	Swatches Tab – Customize Color Window	7-8
7-7	HSV Tab – Customize Color Window	7-8
7-8	RGB Tab – Customize Color Window	7-9
7-9	HSL Tab – Customize Color Window	7-9
7-10	CMYK Tab – Customize Color Window	7-10
7-11	Icon Detail Window	7-11
7-12	Customize Icon Window	7-11
7-13	Translation Details Window	7-13
7-14	Translation Details – Example of Search Results	7-14
7-15	Translation Detail Window – Example.....	7-15
7-16	Translation Detail Window	7-16
7-17	MPS Working Types Window	7-17
7-18	MPS Staged Message Lookup Window.....	7-19
7-19	MPS Staged Message Filter Window	7-20
7-20	MPS Staged Messages Window.....	7-21
8-1	Buddy Stores Window	8-2
8-2	Auto-Receive Stores Window	8-3
8-3	SIM Managed Stores Window	8-5
8-4	Store Admin Window	8-6
8-5	Store Defaults Admin Window	8-7
8-6	System Admin Window.....	8-8
8-7	Inventory Adjustment Reason Maintenance Window	8-9
8-8	Shipment Reason Maintenance Window	8-12
8-9	Tolerances Window	8-14
8-10	Extended Attributes Window	8-15
8-11	Setup Attributes Window	8-16
8-12	Assign Attributes Window	8-17
8-13	Print Setup Window	8-18
8-14	Formats Window	8-21
8-15	Hierarchy Format Assignment Window	8-22
8-16	Hierarchy Format Filter Window.....	8-23
8-17	Hierarchy Format Assignment Filter Window.....	8-24
8-18	UDA Print Setup Window.....	8-25
8-19	Printers Window	8-26
9-1	DSD Receipt Create Window	9-1
9-2	Purchase Order List Window.....	9-2
9-3	Purchase Order Detail Window.....	9-2
9-4	DSD Receiving List Window.....	9-3
9-5	DSD Receiving List Filter Window	9-4
9-6	DSD Receiving Detail Window.....	9-5
9-7	Receiving Info Window	9-6
9-8	DSD Receiving Container Detail Window - On the Fly	9-8
9-9	DSD Receiving Container Detail Window	9-8
9-10	DSD Receiving Container Info Window	9-9
9-11	Document Selection Window.....	9-11
9-12	Extended Attributes Entry Window	9-12
9-13	DSD Receiving Container Detail Window	9-13
10-1	Transfer List Window.....	10-2
10-2	Transfer List Filter Window	10-3
10-3	Promotion Lookup Window	10-5
10-4	Transfer Request Create Window	10-6
10-5	Store Lookup Window	10-6
10-6	Transfer Detail Window – Create Request.....	10-7

10-7	Transfer Create Window	10-8
10-8	Store Lookup Window	10-9
10-9	Transfer Detail Window	10-10
10-10	Transfer Detail Window – Respond to a Transfer Request	10-12
10-11	Transfer Detail Window	10-13
10-12	Transfer Detail Window - Delete a Transfer	10-14
10-13	Transfer Detail Window - Close a Transfer	10-15
10-14	Transfer Info Window	10-16
10-15	Container Item Detail Window	10-17
10-16	Transfer List Window	10-18
10-17	Transfer Shipment List Window	10-19
10-18	Transfer Shipment List Filter Window	10-20
10-19	Transfer Shipment Create Window	10-21
10-20	Store Lookup Window	10-22
10-21	Transfer Shipment Detail Window – Create Shipment	10-23
10-22	Transfer Shipment Info Window	10-23
10-23	Transfer Shipment Container Detail	10-24
10-24	BOL Detail Window – Transfer Shipment	10-25
10-25	BOL Detail Window	10-27
10-26	BOL Detail Window with Carrier Fields Open for Edit	10-28
10-27	Transfer Shipment Container Detail Window	10-30
10-28	Document Selection Window	10-31
10-29	Extended Attributes Entry Window	10-33
10-30	Container Info Window	10-34
10-31	Transfer Receiving List Window	10-36
10-32	Transfer Receiving List Filter Window	10-38
10-33	Promotion Lookup Window	10-39
10-34	Transfer Receiving Detail Window	10-40
10-35	Transfer Receiving Info Window	10-41
10-36	Misdirected Container Window	10-42
10-37	Transfer Receiving Container Detail	10-44
10-38	Advanced Item Entry Window	10-45
10-39	Transfer Receiving Container Info Window	10-47
10-40	Extended Attributes Entry Window	10-48
11-1	RTV List Window	11-2
11-2	RTV List Filter Window	11-3
11-3	RTV Create Window	11-4
11-4	RTV Detail Window	11-5
11-5	RTV Info Window	11-6
11-6	RTV Shipment List Window	11-9
11-7	RTV Shipment Filter Window	11-10
11-8	RTV Shipment Create Window	11-11
11-9	RTV Shipment Detail Window	11-11
11-10	RTV Shipment Container Detail Window	11-12
11-11	BOL Detail Window	11-12
11-12	Extended Attributes Entry Window	11-13
11-13	Container Info Window	11-14
12-1	Inventory Adjustment List Window	12-1
12-2	Inventory Adjustment Filter Window	12-2
12-3	Template Filter Window	12-3
12-4	Template List Window	12-4
12-5	Template Detail Window	12-5
12-6	Inventory Adjustment Detail Window – Create	12-6
12-7	UIN Window – Inventory Adjustment	12-8
12-8	Inventory Adjustment Detail Window – Edit	12-9

13-1	Macro Sequence List Window	13-1
13-2	Macro Sequence Edit Window.....	13-3
13-3	Item Locations List Window	13-5
13-4	Micro Sequence List Window	13-6
13-5	No Location List Window.....	13-8
13-6	No Location Filter Window.....	13-9
13-7	Micro Sequence Edit Window.....	13-10
14-1	Stock Counts Windows.....	14-3
14-2	Stock Count List Window.....	14-4
14-3	Child Stock Count List Window.....	14-5
14-4	Stock Count Detail Window.....	14-7
14-5	Stock Re-Count Detail Window.....	14-9
14-6	Stock Count Authorization Window	14-11
14-7	Extended Attributes Entry Window	14-12
14-8	Stock Count Filter Window	14-13
14-9	Future Stock Count Filter Window	14-14
14-10	Future Stock Count List Window.....	14-15
14-11	Product Group Detail Window.....	14-20
14-12	Authorization Filter Window.....	14-26
14-13	Authorization Detail Window	14-31
14-14	Auto Generation Window – Stock Counts.....	14-32
14-15	Rejected Items Window	14-34
15-1	Shelf Replenishment List Window	15-2
15-2	Shelf Replenishment List Filter Window.....	15-3
15-3	Shelf Replenishment List Create Window	15-4
15-4	Shelf Replenishment List Detail Window	15-6
15-5	Item Substitution Window	15-6
16-1	Item Request List Window	16-1
16-2	Item Request Filter Window	16-2
16-3	Item Request Detail Window – New Request	16-3
16-4	Item Request Detail Window – Edit.....	16-4
17-1	Price Change List Window	17-1
17-2	Price Change Filter Window	17-2
17-3	Price Change Detail Window.....	17-3
18-1	Item Ticket List Window	18-1
18-2	Item Ticket Filter Window.....	18-2
18-3	Item Ticket Detail Window – Create Item Tickets	18-4
18-4	Format Selection window	18-5
18-5	Item Ticket Batch List Window.....	18-6
18-6	Item Ticket Batch Filter Window	18-7
18-7	Printer Selection Window.....	18-8
18-8	Select Item Ticket Reason Window	18-9
18-9	Add Transaction Window	18-9
18-10	Item Ticket Batch Detail Window.....	18-10
18-11	Format Selection Window	18-11
18-12	Item Ticket Batch Detail Window.....	18-12
18-13	Item Ticket Batch Detail Filter Window	18-13
18-14	Item Ticket Detail Window – Create Item Tickets	18-14
18-15	Select UINs Window	18-15
18-16	Additional Attributes Entry Window.....	18-16
18-17	Session Printer Window.....	18-17
19-1	Store Orders Window.....	19-1
19-2	Store Order List Filter.....	19-2
19-3	Store Order Detail Window.....	19-3
19-4	Deals Query Window	19-5

19-5	Item Orders Window	19-5
19-6	Item Sales Window	19-6
20-1	Item Customer Order Window	20-1
20-2	Customer Order Detail Window	20-2
20-3	Item Lookup Window	20-2
20-4	Item Detail Window	20-4
20-5	Supplier Detail Window – Item Lookup	20-5
20-6	Component Info Window	20-6
20-7	Pack Info Window	20-6
20-8	NonSellable Inventory Window	20-7
20-9	Stock Locator Window	20-7
20-10	Planned Deliveries Window - Item Lookup	20-8
20-11	Price Information Window	20-8
20-12	Related Item List Window	20-9
20-13	UDA Detail Window	20-9
20-14	UIN Detail Window	20-10
20-15	UIN Detail Filter Window	20-10
20-16	UIN History Window	20-11
20-17	Item Image Window	20-12
20-18	Supplier Lookup Window	20-13
20-19	Supplier Detail Window	20-14
20-20	Container Lookup Window	20-15
20-21	Container Detail Window	20-16
20-22	Finisher Lookup Window	20-16
20-23	Finisher Detail Window	20-17
20-24	Transaction History Filter Window	20-18
20-25	Transaction History List Window	20-19
21-1	Customer Order Management List Window	21-1
21-2	Customer Order Management Filter Window	21-2
21-3	Customer Order List Window	21-3
21-4	Customer Order Filter	21-3
21-5	Customer Order Detail Window	21-4
21-6	Customer Order Notes Window	21-4
21-7	Customer Detail Window	21-5
21-8	Customer Order Pick List Window	21-5
21-9	Customer Order Pick Filter Window	21-6
21-10	Customer Order Pick Create Window	21-7
21-11	Customer Order Pick Detail Window	21-7
21-12	Bin Detail Window	21-8
21-13	Item Substitution Window	21-9
21-14	Customer Order Delivery List Window	21-10
21-15	Customer Order Delivery Detail – Create Window	21-11
21-16	BOL Detail Window – Customer Order Delivery	21-11
21-17	Extended Attributes Entry Window	21-13
21-18	Customer Order Reverse Pick List Window	21-14
21-19	Customer Order Reverse Pick List Detail Window	21-15

Send Us Your Comments

Oracle Retail Store Inventory Management User Guide, Release 15.0.3

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document.

Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the Online Documentation available on the Oracle Technology Network Web site. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: retail-doc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

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If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at <http://www.oracle.com>.

Preface

This guide describes the Oracle Retail Store Inventory Management user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

Audience

This User Guide is for users and administrators of Oracle Retail Store Inventory Management. This includes merchandisers, buyers, business analysts, and administrative personnel.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

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Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Related Documents

For more information, see the following documents in the Oracle Retail Store Inventory Management Release 15.0.3 documentation set:

- *Oracle Retail Store Inventory Management Installation Guide*
- *Oracle Retail Store Inventory Management Operations Guide*
- *Oracle Retail Store Inventory Management Release Notes*
- *Oracle Retail Store Inventory Management Data Model*

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL: <https://support.oracle.com>

When contacting Customer Support, please provide the following:

- 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, 15.0) or a later patch release (for example, 15.0.1). If you are installing the base release and additional patch releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

Improved Process for Oracle Retail Documentation Corrections

To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times **not** be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Technology Network Web site, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

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

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

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

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

Oracle Retail Documentation on the Oracle Technology Network

Oracle Retail product documentation is available on the following web site:

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

(Data Model documents are not available through Oracle Technology Network. You can obtain these documents through My Oracle Support.)

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	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.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Oracle Retail Store Inventory Management

Oracle Retail Store Inventory Management (SIM) helps store personnel to perform many in-store operations:

- Receive merchandise from the warehouse, finisher, or directly from vendors
- Replenish and order stock
- Request and implement price changes
- Manage physical inventories and perform stock counts
- Look up detailed information about merchandise items, suppliers, containers, and customer orders
- Transfer or return stock
- Manage customer orders
- Print tickets, labels, and reports

SIM User Interface

There are two user interfaces for SIM:

- Oracle Retail Store Inventory Management, the user interface on the PC
- Oracle Retail Mobile Store Inventory Management, the user interface on the handheld

This user guide describes how to use the SIM user interface on the PC. The SIM application is organized by functional areas, and the menus lead you to the specific tasks that you need to perform.

Each SIM task is described in detail in this guide. Also see [Chapter 2, "Using SIM"](#) for general information about features of the SIM user interface.

For more information about the SIM user interface on the handheld, see the *Oracle Retail Store Inventory Management Implementation Guide*.

Administration

The administration functions include the following tasks usually performed by a SIM system administrator or a manager:

- SIM setup and technical maintenance
- Security setup to define SIM users and their roles
- Setup and scheduling of the product groups used for stock counts, shelf replenishment lists, item requests, and wastage calculation

-
- Setup and maintenance of Unique Identification Numbers (UIN), such as serial numbers, for items that require them (optional feature)
 - Maintenance of variances allowed for ad hoc stock counts and customer order picking
 - Setup of inventory adjustment and shipment reason codes
 - Setup of tickets, reports, labels, and printers

Shipping and Receiving

The shipping and receiving functions include the following:

- Direct store deliveries
- Deliveries from company-owned warehouses or external finishers
- Transfers between stores
- Returns to suppliers, warehouses, or finishers

Inventory Management

The inventory management functions help you to maintain an accurate perpetual store inventory, and they include the following:

- Inventory adjustments
- Stock counts
- Sequencing
- Shelf replenishment
- Item requests
- Store orders
- Price changes

Customer Order Management

The customer order management functions help you maintain the customer orders, and they include:

- Customer order
- Pick
- Delivery
- Reverse pick
- Reject Order

Lookups

At any time, you can look up detailed information about inventory items, suppliers, and containers. You can also look up related information at the same time. For example, while you are looking up an item, you can also view information about the suppliers of the item.

Print

The print functions help you management printing tickets, labels, and reports. The print functions include:

- Item Ticket

-
- Item Ticket Batch
 - Session Printer
 - Reports

Change Store

This administration screen allows you to change your log in store.

Change Password

This administration screen allows you to change your user password.



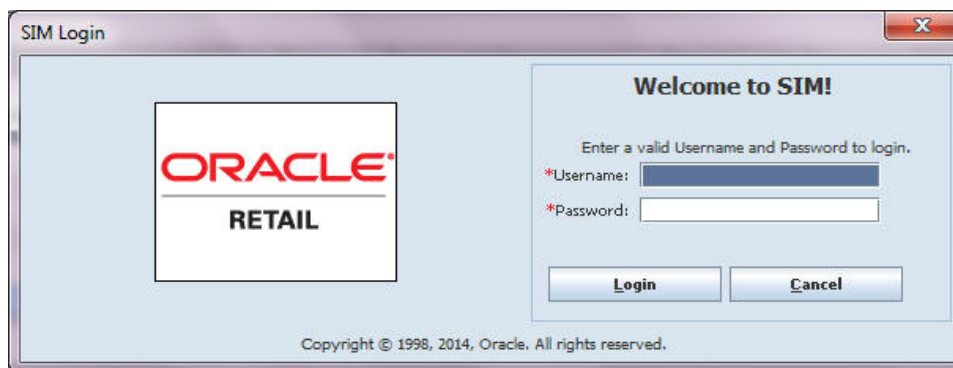
The following topics describe how to navigate the SIM user interface and use some of its standard features. These topics are included:

- [Log In, Log Out, and Exit SIM](#)
- [Select a SIM Store](#)
- [Change Your SIM Password](#)
- [Use Standard SIM Interface Controls](#)
- [Jump to Another Functional Area Using Quick Jump](#)
- [Scan an Item \(Scanner Button\)](#)
- [Access Online Help](#)
- [Set User Preferences](#)
- [Print or View SIM Reports and Other Output](#)
- [View Client Information](#)
- [Configure Client Logging](#)

Log In, Log Out, and Exit SIM

The way that you start SIM depends on how SIM is set up at your location. Contact your system administrator for instructions. After you have started SIM, the SIM Login window opens.

Figure 2–1 SIM Login Window



Log In to SIM

1. Enter your user ID.
2. Enter your password.
3. Click **Login**. The main menu opens.

Figure 2–2 SIM Main Menu



Note: If your login ID and password are authorized for more than one store, see [“Select a SIM Store.”](#)

Log Out of SIM

From the Main Menu, click **Logout**.

At this point, you or another user can log in, or you can exit SIM.

Exit SIM

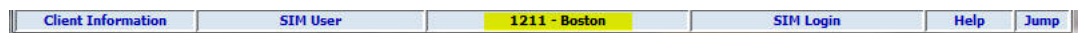
To exit SIM and close the application, follow these steps:

1. From the SIM Login window, click **Exit**. A message is displayed: “Are you sure you want to exit the application?”
2. Click **Yes**. SIM closes.

Select a SIM Store

If your SIM role allows you to work with more than one SIM store, the main menu includes the Change Store button. The current SIM store is displayed in the status display area.

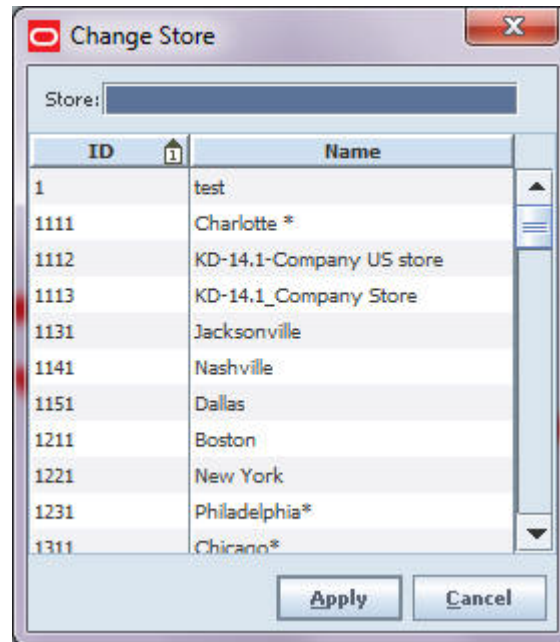
Figure 2–3 Current Store



Use the Change Store window at any time during your SIM session to select the store you want.

1. On the Main Menu, click **Change Store**. The Change Store popup window opens.

Figure 2–4 Change Store window



2. Enter the ID or store in the Store entry field, or select the ID/Store from the scroll list.
3. Click **Apply** to change the store to the selected option. The highlighted store will become the new store in which the user is logged in to.

Field	Description
Store	Store ID or Store name entry field used for searching.
ID	Store identification.
Name	Store name associated with the store ID.

Change Your SIM Password

Note: Depending on how SIM security is configured, the Change Password function may not be available.

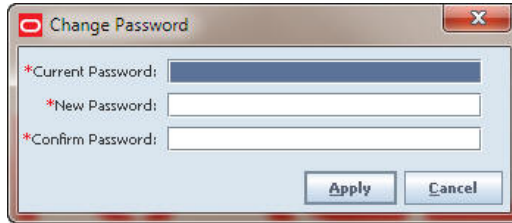
You can change your SIM password at any time. If you are a new SIM user, you may be required to change your password the first time that you log in to SIM. You should also change your password before it expires. If your password has expired, you will need the help of a system administrator to help you change your password and obtain access to SIM.

Note: SIM passwords are case-sensitive. Depending on how SIM is configured, there may be rules for minimum and maximum length. A valid password may also need to contain specific characters, such as a capital letter or a special character (for example, # or &).

To change your SIM password, follow these steps:

1. On the Main Menu, click **Change Password**. The Change Password window opens.

Figure 2–5 Change Password Window



2. In the **Current Password** field, enter the password that you are currently using.
3. In the **New Password** field, enter the new password that you want to use.
4. In the **Confirm Password** field, enter your new password again.
5. Click **OK**.

Use Standard SIM Interface Controls

This section describes some of the standard features and controls of the SIM interface. You use a standard set of controls, such as buttons and lists, to select, enter, and edit data in any functional area of the SIM interface.

SIM Status Display

The status bar at the bottom of every window provides status information, access to online help, and access to detailed user information.

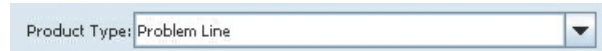
Figure 2–6 Status Display



- Double-click the **Client Information** panel to display the Client Information window. Through the Client Information window, you can select a display theme to customize the appearance of the SIM interface. The Client Information tabs also display many details about the software version, user PC, and network connections. For more information, see these sections in this chapter:
 - [“Set User Preferences”](#)
 - [“View Client Information”](#)
- The second panel shows the identity of the user who is currently logged in.
- The third panel shows the store number.
- The fourth panel shows the name of the current window.
- Double-click the **HELP** panel to display SIM online help in your Web browser. See [“Access Online Help.”](#)
- Double-click the **JUMP** panel to jump to a different functional area of SIM. See [“Jump to Another Functional Area Using Quick Jump.”](#)

Use a Drop-Down List to Select Field Values

Some fields can accept values only from a predefined list of options. For example, a Product Type field might allow only a limited number of valid product types. A field that requires a value contained in a list has a down arrow button at the right side of the field.



To select an item from a drop-down list:

1. Click the down arrow button. A drop-down list of options is displayed.
2. Select a value from the drop-down list. The selected option is entered in the field.

If you type a value into a field with a drop-down list, SIM automatically positions to the first item in the drop-down list that begins with the characters you enter. For example, if you type 'stock' in a field with a drop-down list, SIM automatically positions to the first list item that begins with 'stock'.

Selections in drop-down lists are sorted in alphanumeric order, character-by-character. The sort sequence follows this pattern:

0
1
...
10
11
...
2
...
A
...

Select Multiple Options from a List

For some fields, you can select more than one value from a list of values.

Select a Sequence of Values

To select a sequence of adjoining items from a list, follow these steps:

1. Select the first item in the sequence to highlight it.
2. Hold down the Shift key, scroll to the last item you want to include, and select it. All sequential items are selected.

Select Multiple Nonsequential Values

You can also select items randomly from a list. To do this, follow these steps:

1. Select the first item in the sequence to highlight it.
2. Hold down the Ctrl key and select each item in the drop-down list that you want to include.
3. When you have selected all the items you want, click **OK**.

Use Standard SIM Buttons

The following are buttons that appear in SIM windows and have special meanings and uses. These buttons are used in many different windows.

Calendar



Click the **Calendar** button to open a Calendar window in which you can select a date value. For more information, see [“Use the Calendar to Select a Date.”](#)

Ellipsis



Click the **Ellipsis** button to open another window that displays additional information or provides additional functions. For example, an Ellipsis button might give you the option to look up an item or supplier while you are performing another task.

Text Editing



Click the **Text Editing** button to open a text editing window. This button is available for fields that allow longer text values, such as description fields. For more information, see [“Edit Text for Long Text Fields.”](#)

Use the Calendar to Select a Date

The calendar allows you to view a monthly calendar and select a date. For a date field, the **Calendar** button is displayed to the right of the field.

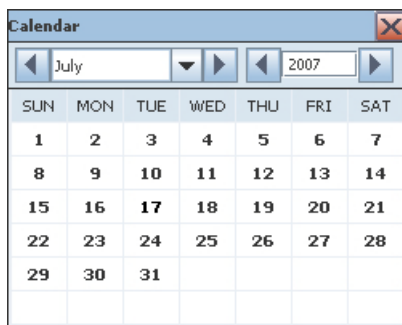


When you select a date from the calendar, SIM enters the date for you in the correct format.

To select a date, follow these steps:

1. Click the **Calendar** button. The Calendar window displays the current month and year.

Figure 2–7 *Calendar Window*



2. Select the month and year:
 - To select a previous date, click the left arrow next to the month or year.

- To select a future date, click the right arrow next to the month or year.
3. Select the date you want on the calendar. The selected date is entered in the date field.

Edit Text for Long Text Fields

For some fields that allow longer text values, such as a comment or description, it is sometimes difficult to see all the text you are entering. For some fields, a Text Editing button with a balloon graphic is displayed next to the field, as in the following example.



1. Click the **Text Editing** (balloon) button to open a text editing window. The title of the window is the title of the field.

Figure 2–8 Text Editing Window



2. Enter the text for the field.
3. Click **OK** to close the text editing window and return. The text you entered is displayed in the field.

Note: If you enter a carriage return in the text editing field and click **OK**, the description or comments field becomes disabled. The text editing window retains the carriage return (for example, in an address). If you remove the carriage return and click **OK**, the description or comments field becomes editable again.

Use Navigation and Shortcut Keys

Instead of clicking with the mouse, you can use SIM navigation and shortcut keystrokes on the keyboard. These keystrokes are similar to those you find in other PC applications. They are options that you can use to save time and motion as you work in the SIM user interface. In particular, the field navigation keys make it easier to enter and update data.

Field Navigation Keys

To navigate through fields in SIM windows, you can use the following shortcut keys.

Function	Key
Next field	Tab
Previous field	Shift+Tab

Button Shortcut Keys

Button shortcut keys are keys or key combinations that you can press, instead of clicking the mouse on window buttons. There are two kinds of shortcut keys in SIM:

- Alt+ key combinations
- The function keys F1, F2, and so on

Note: Alt+ key combinations depend on the language you are using with SIM. These key combinations do not work if your keyboard has no Roman characters. The standard function keys F1, F2, and so on are supported for all languages as button shortcuts.

Alt+ Key Combinations

An Alt+ shortcut key option is indicated by an underlined letter on a button, as in the following figure.

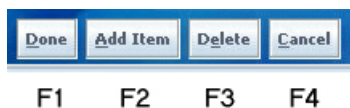


In the figure, Alt+D performs the same action as clicking **D**one, Alt+A the same action as clicking **A**dd Item, and so on.

To use a shortcut key instead of a mouse click, press **Alt** along with the key for the underlined letter.

Function Keys

You can use the function keys F1, F2, and so on, as shortcut keys for screen buttons. For each screen button, SIM assigns the function keys in order to the buttons from left to right. F1 is a shortcut key for the first button, F2 for the second button, and so on, as illustrated in the following figure.



Jump to Another Functional Area Using Quick Jump

The SIM user interface provides a jump feature that allows you to switch quickly to another functional area, without navigating through a series of menus.

Using the jump feature, you can switch quickly among these major functional areas:

- Customer Order
- DSD Receiving

- Inventory Adjustment
- Item Lookup
- Product Group
- Purchase Order
- RTV
- RTV Shipment
- Stock Count
- Transaction History
- Transfer
- Transfer Receiving
- Transfer Shipment

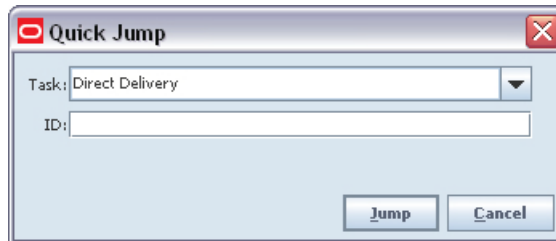
The SIM status bar includes a JUMP panel in the lower right corner of the window.



To jump to another functional area, follow these steps:

1. Double-click the **JUMP** panel (or press the **F12** key).
The Quick Jump window opens.

Figure 2–9 Quick Jump Window



2. From the **Task** drop-down list, select the functional area to which you want to jump.
3. (Optional) If you know the specific identifying number, enter that information in the **ID** field. The following are ID values you can enter.

Task	Optional ID
Customer Order Pick	Pick ID
Transaction History	Not applicable
Customer Order	Customer Order ID
DSD Receiving	Delivery ID
Inventory Adjustment	Adjustment Number
Item Lookup	Item ID
Product Group	Product Group ID
Purchase Order	Purchase Order Number

Task	Optional ID
RTV	RTV ID
RTV Shipment	RTV Shipment ID
Stock Count	Stock Count ID
Transfer	Transfer ID
Transfer Receiving	Delivery ID or ASN
Transfer Shipment	Shipment ID or ASN

4. Click Jump.

- If you entered an ID value, you jump to the transaction or detail window for that ID.
- If you did not enter an ID value, you jump to the list or lookup window for the selected functional area, where you can select the specific record you want.

For example, if you select Item Lookup and enter an item ID, you jump to the Item Detail window for that item. If you select Item without entering an ID, you jump to the [Item Lookup](#) window, where you can search for the item you want.

When you exit an item lookup, you return to the task you were doing before the jump.

For other jumps, when you exit the functional area to which you jumped, you return to the SIM main menu.

Scan an Item (Scanner Button)

The Scanner will accept entry or scanning ms and barcodes the item entry field accepts, such as item number, UPC, Type 2. Once an item or barcode is entered, the system retrieves the item information and the item and description will display.

To add an item to various screens within SIM:

1. Click **Scanner**. The Advanced Item Entry window opens.

Note: The scanner may automatically open on the screen, if configured as such.

Figure 2–10 Advanced Item Entry window

2. Scan the item. The fields populate with the item information.

Note: The Advanced Item Entry window fields may vary, depending upon the function being accessed and the items being scanned.

3. Select **Auto Apply Items** to bypass the next step on a continual basis.
4. Click **Apply**. The window closes and the item is populated.

Access Online Help

The SIM online help contains all of the same information as the *Oracle Retail Store Inventory Management User Guide*. You can open online help from any window where the HELP panel is displayed in the SIM status display bar (lower right of the window).



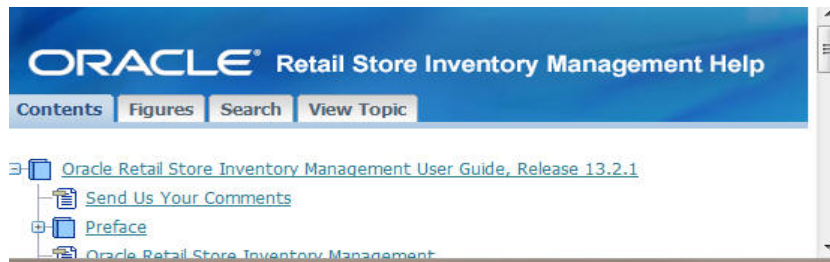
To open SIM online help, double-click the **HELP** panel. The table of contents of the SIM online help opens in your default Web browser.

You can also open online help by clicking **Help** on the SIM main menu.

You can leave online help open while you work in the SIM user interface. To close online help, close the Web browser window or tab.

Help Tabs

SIM online help is displayed in the same format as the help for many other Oracle software products. The Contents tab opens first.

Figure 2–11 Help Tabs

The SIM online help has the following tabs:

- **Contents**
Use the Contents tab to locate and open a topic in the table of contents.
- **Figures**
In the Figures tab, you can select any listed figure to open the help topic that contains that figure.
- **View Topic**
The View Topic tab is open when you are viewing a help topic.
If you want to print the topic that is currently displayed, click **Printable Page**.
If you want to locate the current topic in the table of contents, click **Locate in Contents**.

Help Navigation

You can page through the online help topics in the same order that they are presented in the user guide. In the View Topic tab, click the Next and Previous links to browse through the help topics.




Set User Preferences

For each PC on which SIM is installed, the user can set some preferences for how the SIM interface works. This section describes how to customize your own installation of the SIM client interface through these available options:

- [Set Table View Preferences](#)
- [Select a Display Theme](#)

Set Table View Preferences

Many SIM windows contain sorted tables. The tables are lists of items, containers, suppliers, transfers, or other information that applies to the task you are performing. The Warehouse Delivery List window is an example of a SIM table:

Back Customer Orders Print Refresh			
Filter		Status = Active	
ID	ASN 	Status	ETA
301	ASN301	In Progress	5/29/13
6001	ASN601	In Progress	4/15/13
6060	ASN6060	In Progress	5/5/13

If you want a different view of a table, you can set options to control how that table is displayed to you. You can change the display of tables as follows:

- [Set Text Size \(Size Content\)](#)
- [Set Gridline Display](#)
- [View or Change Text Size and Gridlines Settings](#)
- [Control Which Columns Are Displayed](#)
- [Sort a Table by One Column](#)
- [Sort a Table by Multiple Columns](#)

You can change view options anytime you want. Your view options are saved on the PC where you set the options, so you do not need to set them again.

Note: The view options you set apply only to the table that is displayed when you set the options. You can have different view options for different tables. View options apply only to the user (login ID) who sets the options, and only on the PC where the options were set.

To set view options, right-click anywhere in the table. A pop-up menu is displayed.

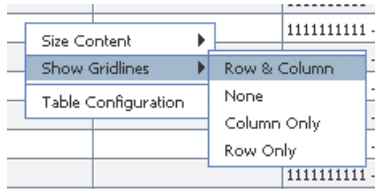
Set Text Size (Size Content)

To make the text larger or smaller, select from the pop-up menu the text size you prefer:

		111111
Size Content	▶ Smallest	1111
Show Gridlines	▶ Smaller	1111
Table Configuration	Standard	1111
	Larger	1111
	Largest	1111
		111111

Set Gridline Display

Table rows are shaded so that they are easier to read. You can also choose whether the table has vertical lines, horizontal lines, both, or neither. To set which gridlines to display, select from the pop-up menu.

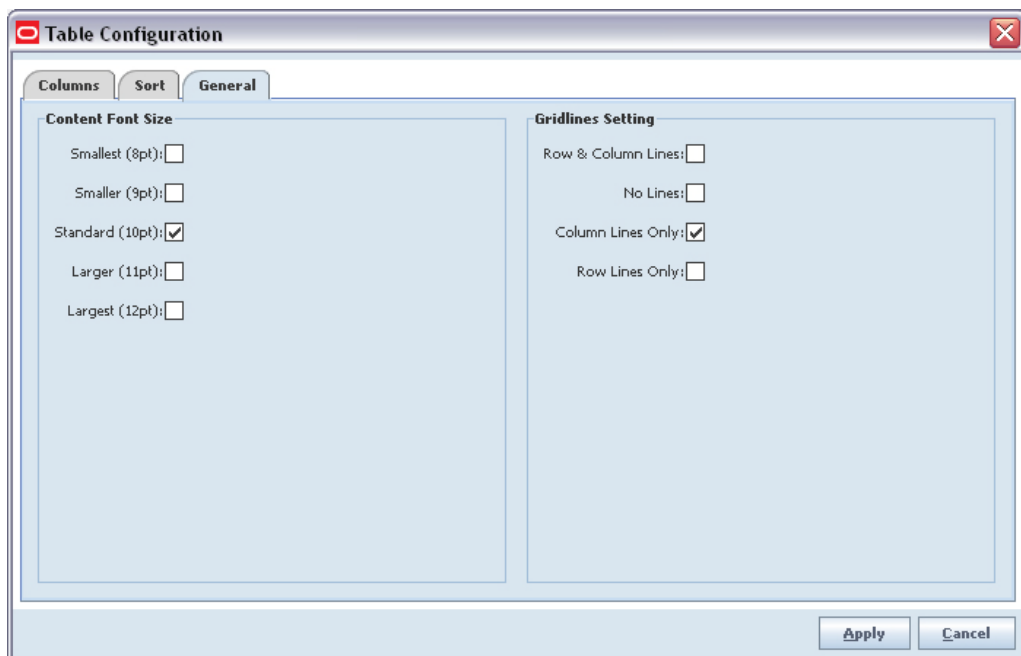


View or Change Text Size and Gridlines Settings

To view or change the current text size or gridlines settings, follow these steps:

1. Select **Table Configuration** from the pop-up menu. The Table Configuration window opens.
2. Select the **General** tab.

Figure 2–12 Table Configuration Window - General Tab



3. If you want to change the Content Font Size or Gridlines Setting values, follow these steps:
 - a. Select the check boxes for the settings you prefer.
 - b. Click **Apply**.

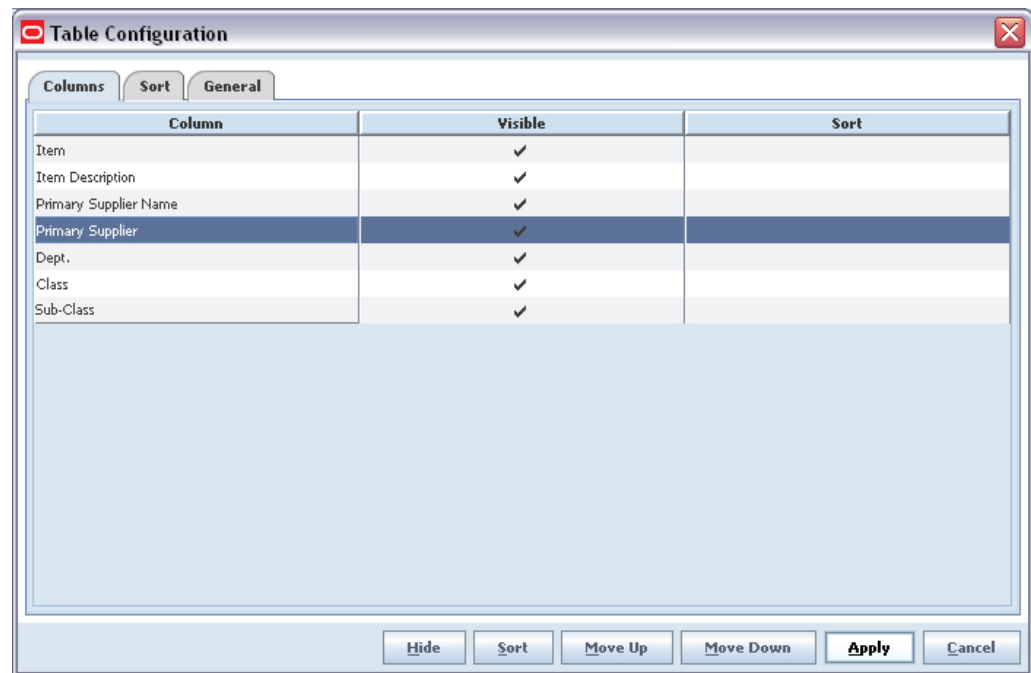
Control Which Columns Are Displayed

SIM tables are designed to display the information that is helpful to most users. If you do not need to see certain table columns, you can turn off display of those columns. You can also control the order in which columns appear in the table.

To remove or restore the display of a table column, follow these steps:

1. Select **Table Configuration** from the pop-up menu. The Table Configuration window opens.

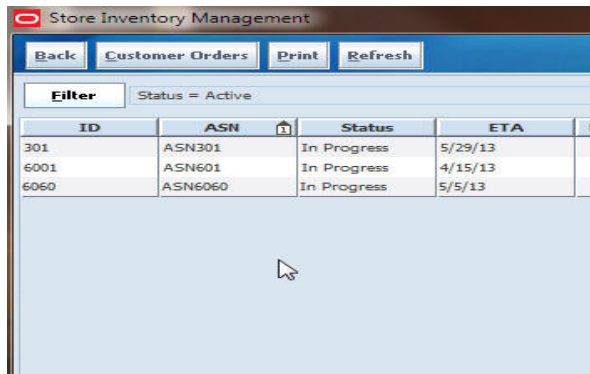
Figure 2–13 Table Configuration Window - Columns Tab



2. Select the **Columns** tab. The table columns are listed in the order in which they are displayed, from left (top) to right (bottom).
3. To control whether a column is visible or hidden, select the row that contains the column name:
 - To hide the column so that it is not displayed, click **Hide**.
 - To make a hidden column visible again, click **Visible**.
4. To control the order in which columns are displayed in the table, select a row that contains a column name that you want to move:
 - To move the column left, click **Move Up**.
 - To move the column right, click **Move Down**.
5. Click **Apply** to apply your changes and close the Table Configuration window.

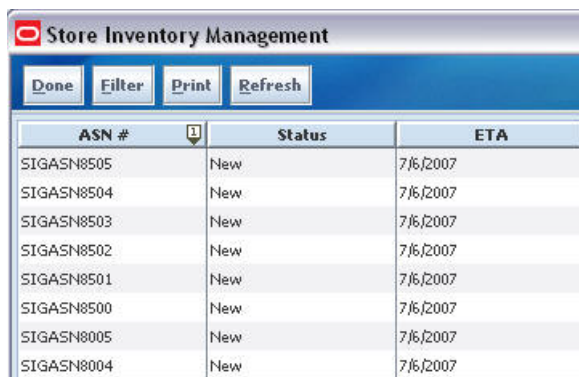
Sort a Table by One Column

You can sort a table according to the values of a column by clicking the column heading for that column. For example, the following figure shows that the table is sorted in ascending order by ASN#.



ID	ASN	Status	ETA
301	ASN301	In Progress	5/29/13
6001	ASN601	In Progress	4/15/13
6060	ASN6060	In Progress	5/5/13

Click the column heading again to sort in descending order, as shown in the following figure.



ASN #	Status	ETA
SIGASN8505	New	7/6/2007
SIGASN8504	New	7/6/2007
SIGASN8503	New	7/6/2007
SIGASN8502	New	7/6/2007
SIGASN8501	New	7/6/2007
SIGASN8500	New	7/6/2007
SIGASN8005	New	7/6/2007
SIGASN8004	New	7/6/2007

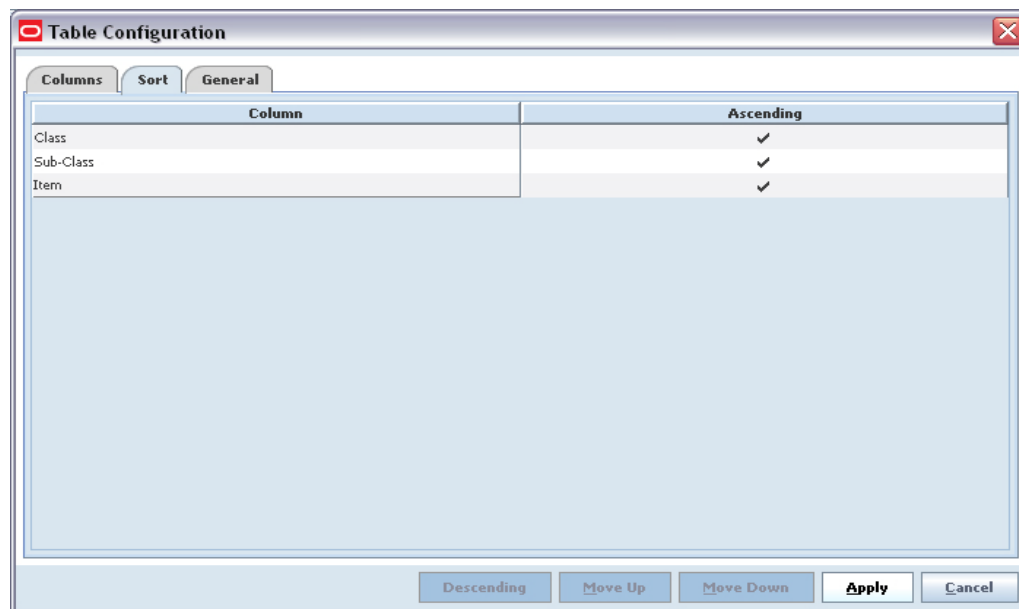
Sort a Table by Multiple Columns

You can also sort a table using more than one column (sort key). For example, you may prefer that a table is sorted by Class, then by Sub-Class, then by Item.

To specify the columns used to sort the rows (records) in a table, follow these steps:

1. Select **Table Configuration** from the pop-up menu. The Table Configuration window opens.
2. Select the **Columns** tab.
3. To specify whether a column is to be used for sorting:
 - a. Select the row that contains the column name.
 - b. Click **Sort** to use the column as a sort key, or click **No Sort** if you no longer want to use that column as a sort key.
 - c. Repeat Steps a and b as needed until you have selected the columns you want to use for sorting.
4. Select the **Sort** tab. The columns you selected as sort keys are listed.

Figure 2–14 Table Configuration Window - Columns Tab



5. Arrange the list so that the primary (most important) sort key is listed first, and the least important sort key is listed last:
 - Select the column you want to use as the primary sort key and click **Move Up** until it is at the top of the list.
 - Use the **Move Up** and **Move Down** buttons to arrange the other sort keys in the order you want.
 - If you want to sort in descending order for any sort key, select that key and click **Descending**.

For example, if you want to sort by Class, then Sub-Class (within Class), then by Item (within Sub-Class), the sort keys must be listed in that order.

6. Click **Apply** to apply your sort order and return to the table.

Select a Display Theme

A theme controls how the user interface appears. In addition to the standard SIM theme, you can have customized themes that use your company logo, different colors, different fonts, and different icons. Through the Client Information window, you can select a theme from those available for your use.

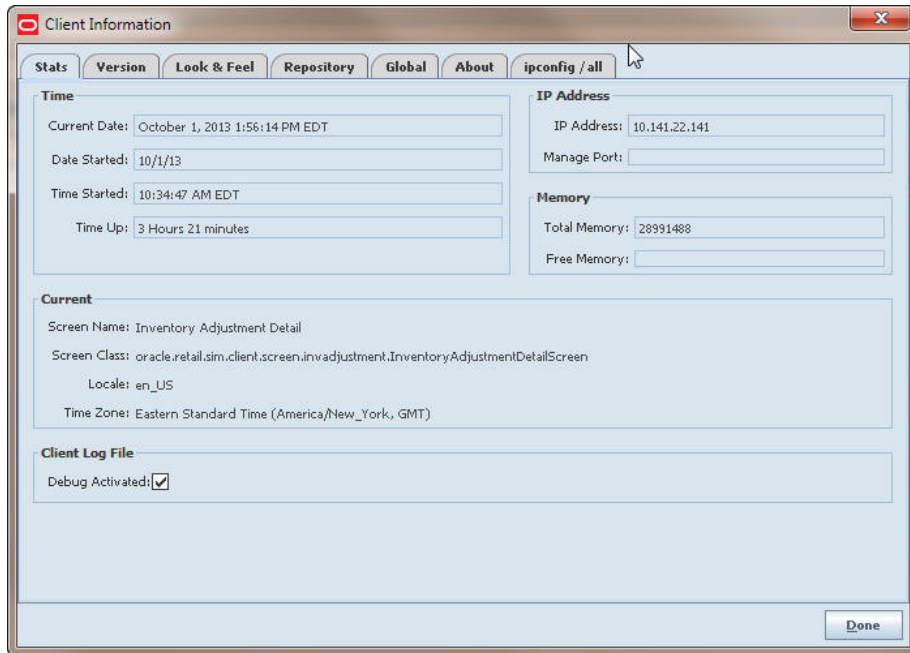
To select a theme, follow these steps:

1. In any SIM window, double-click the **Client Information** panel in the bottom left corner of the window.



The Client Information window opens.

Figure 2–15 Client Information Window



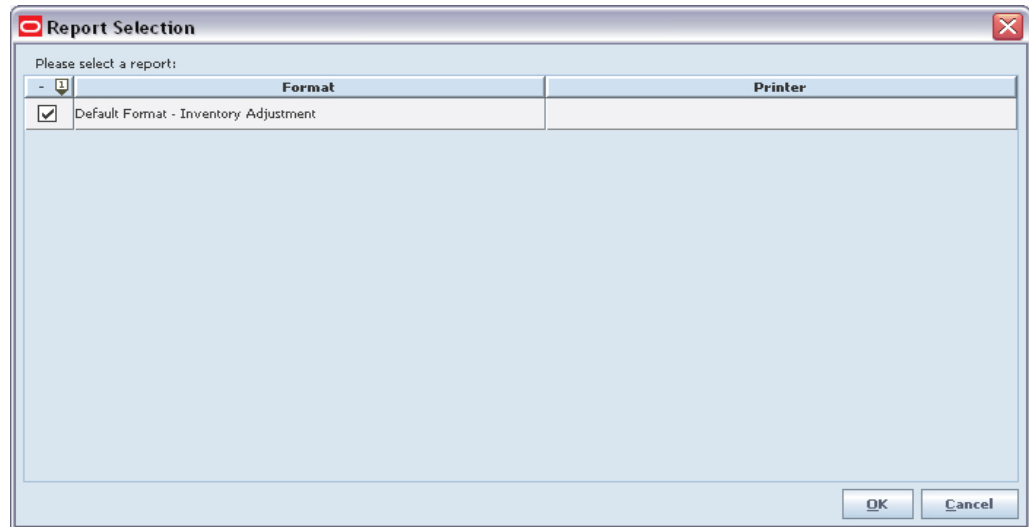
2. Click the **Look & Feel** tab.
3. On the list of themes, click the theme you want to use.
4. Click **Apply**. Your selected theme is applied.
5. Click **Done** to close the Client Information window.

Print or View SIM Reports and Other Output

SIM reports and other output can be customized to use many different output devices and formats. When you request a report, or output such as labels or tags, the output depends on how SIM is configured at your site.

When you request a report or other output from the Main Menu > Print, the Print Menu window opens. From here you can select various items to print. Click Reports to open the Reports Selection window.

Figure 2–16 Report Selection Window



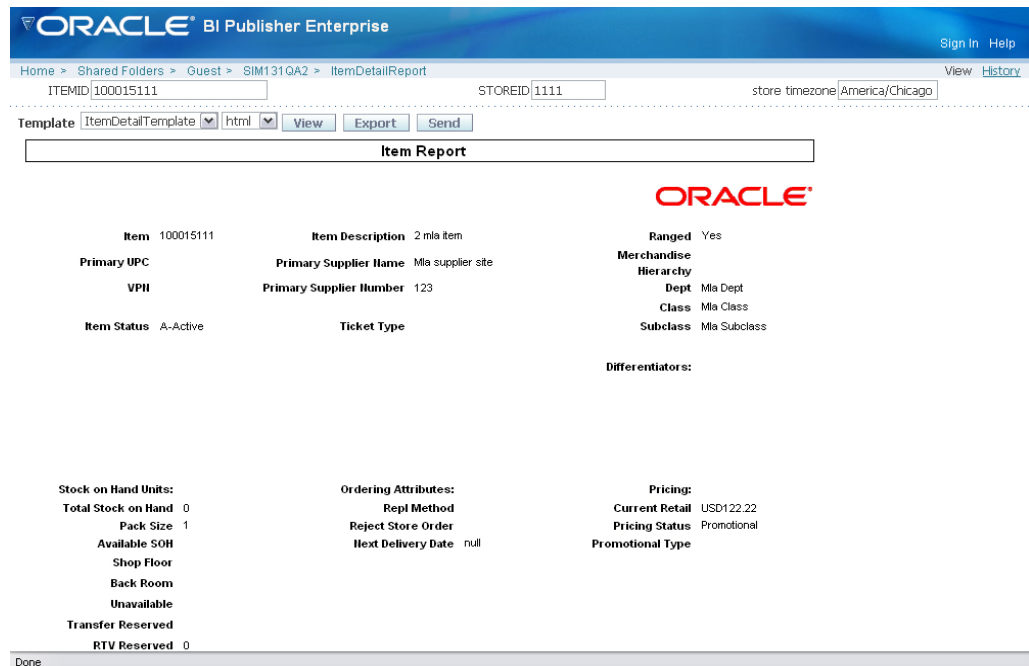
To view or print the output, follow these steps:

1. In the first column, select the check box for the report you want, if more than one is listed.
2. In the **Printer** column, select the name of the printer (or other output device) that you want to use.
3. Click **OK**. The output is processed, and you receive a confirmation message.

Some of your reports may be produced in Oracle BI Publisher. In this case, the report is displayed in your Web browser.

The following figure is an example of an Oracle BI Publisher report.

Figure 2–17 Oracle BI Publisher Report Output



For information about using Oracle BI Publisher, see the *Oracle Business Intelligence Publisher User's Guide*.

The *Oracle Retail Store Inventory Management Implementation Guide* provides more information about reports for SIM system implementers and administrators.

View Client Information

The Client Information window displays many details about the configuration of the PC that you are currently using. This information can be useful when it is necessary to check the current configuration or solve operating problems that may be related to the PC. There are no SIM operating procedures in the Client Information window. Except for the Debug Activated check box (see [Configure Client Logging](#)), you cannot change any of the information that is displayed; these settings are maintained through other procedures not available in the SIM user interface.

The Client Information link is available on many SIM windows, including menus, lists, and detail windows. You can access client information from any of these windows.

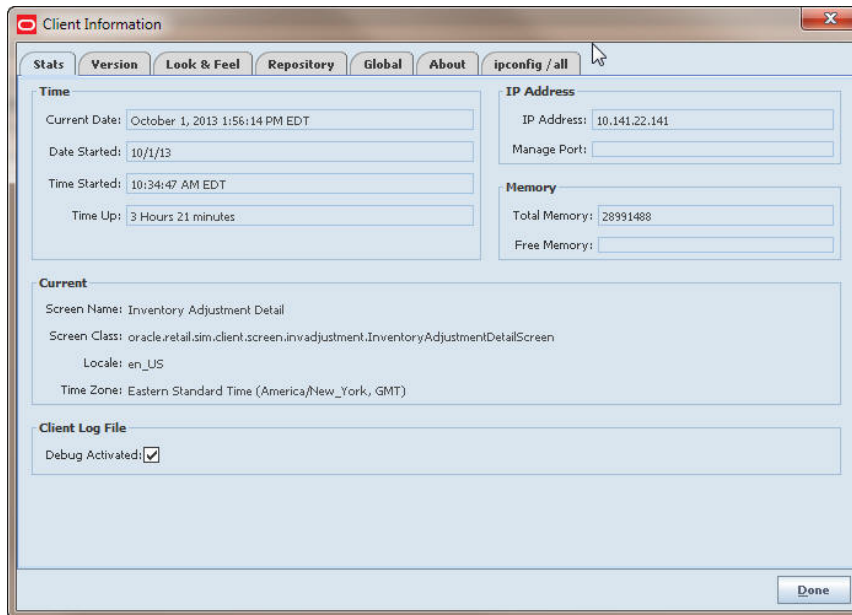
To view client information, follow these steps.

1. Double-click the **Client Information** panel in any window where it is displayed.



The Client Information window opens.

Figure 2–18 Client Information Window



2. View client information on the Client Information window tabs.
3. Click **Done** to close the Client Information window.

Configure Client Logging

The Client Information window includes a check box option to turn on client logging. When the Debug Activated check box is selected, logs are written to log files on the PC to record SIM events. This information is useful only in rare cases when your systems personnel need to study an operating problem that may be related to your PC.

Note: Turn on client logging only as directed by your systems personnel. Client logging slows down SIM performance and can create very large files that waste disk space on the PC. Always keep client logging turned off when it is not needed.

To enable or disable client debug logging, follow these steps:

1. Double-click the **Client Information** panel in any window where it is displayed. The Client Information window opens.
2. Enable or disable client logging as follows:
 - Select the **Debug Activated** check box to enable client logging.
 - Deselect the **Debug Activated** check box to disable client logging.
3. Click **Done** to close the Client Information window.

Note: After you disable client logging, be sure that your systems personnel locate and delete any logging files from your PC. These files are not needed for SIM operations, and they waste disk space.

Product Groups

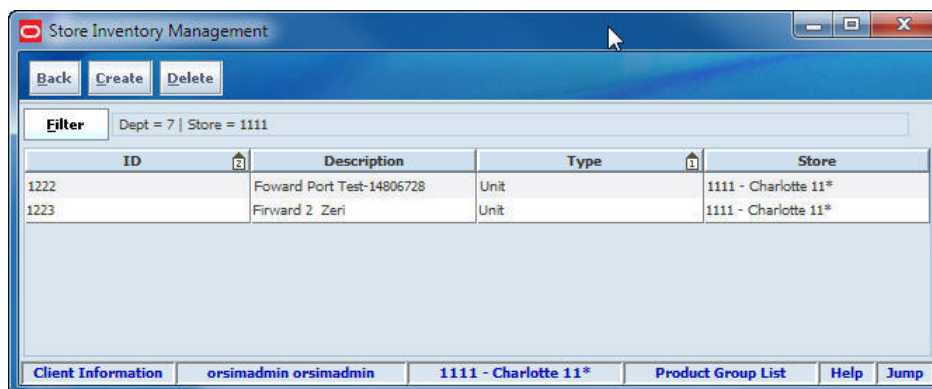
A product group is a collection of departments, classes, subclasses, or items that are grouped together for a common purpose. Product groups are used throughout SIM for these purposes:

- To schedule and perform different types of stock counts (Problem Line, Unit, and Unit and Amount product groups)
- To request items for a store (Item Request product groups)
- To create shelf replenishment lists to replenish store shelves (shelf replenishment product groups)
- To adjust inventory automatically for wastage (Wastage product groups)

Product Group List Window

Navigate: Main Menu > Admin > Product Group. The Product Group List window opens.

Figure 3–1 Product Group List Window



From the Product Group List window, you can do the following:

- [Filter the Product Group List](#)
- [Create a Product Group](#)
- [Edit a Product Group](#)
- [Delete a Product Group](#)

From the Product Group List window, click **Back** to return to the Admin menu.

Reference Topics

The following topics provide background information about setup of SIM product groups. Review these topics as needed as you are setting up different types of product groups:

- [Product Group Types](#)

This topic describes all of the different types of SIM product groups and the reasons for using the different types.

- [Counting Methods for Stock Counts](#)

This topic describes the counting options that apply to Unit, Unit and Amount, and Problem Line stock count product groups.

- [Product Group Size Limits](#)

This topic describes how SIM automatically divides large product groups into smaller child groups, so that they are easier to manage when you are using the SIM user interface.

Product Group Types

The following are the types of product groups you can create in SIM.

Also see the *The Oracle Retail Store Inventory Management Implementation Guide, Volume 1– Configuration* for additional information about product group functionality and process flows.

Auto Ticket Print

An auto ticket print product group is used to setup a group of items that can be automatically printed by the batch. Ticket batches may be created internally or externally.

You can schedule when a product group batch process is run. The auto ticket print product group may be scheduled to run daily, weekly, monthly or yearly. If the product group is scheduled for the same day, the user may print the ticket batch immediately.

The product group may be configured to refresh the ticket quantity based on the current stock on hand of the item prior to printing the ticket.

Item Request Product Groups

The Item Request product group type facilitates requests for items that use store order replenishment. You can add individual items, as well as entire sections of the merchandise hierarchy, to an Item Request product group.

When the Item Request product group is scheduled for review, SIM automatically generates a blank item request and adds all items within the specified merchandise hierarchies with Store Order replenishment type to the item request, along with any individual items specified as part of the Item Request product group. You can then enter the actual quantities of the items needed and submit the request.

You can also add items that do not have Store Order replenishment type to an Item Request product group, but only on an item-by-item basis.

Shelf Replenishment Product Groups

You can create a within-day or an end-of-day shelf replenishment list from within the Product Group functional area. The two different types of shelf replenishment lists

have store level configurations for the fill level. Typically, an end-of-day shelf replenishment list has a higher fill level than a within-day shelf replenishment list, because there is more time to stock the shelves at the end of the day.

When you create a shelf replenishment list, SIM runs a replenishment calculation that checks for those items that belong to shelf replenishment list product groups. The replenishment calculation compares the capacities of those items to their shop floor stock on hand. SIM then generates a shelf replenishment list ordered by the items that need replenishment the most. For within-day shelf replenishment lists, SIM stops when the amount to replenish is equal to the amount suggested by the system. For end-of-day shelf replenishment lists, SIM continues until all items that need replenishment are picked.

Shelf replenishment lists can be created on the PC or the handheld and can be fulfilled on either device.

Problem Line Stock Count Product Groups

Problem Line stock count product groups use predefined criteria to identify problem items. For example, you might decide to count all of the items that have negative stock on hand values. Individual items and item hierarchies are associated into a single problem line product group for a stock count. One or more stores can be assigned to the scheduled stock count.

After criteria are established, based on problem areas, a batch process finds all items that meet the criteria. The items found are added to the scheduled stock count. Problem line items are counted in the same way as in a scheduled unit stock count. Problem line stock counts can only be scheduled daily.

Users with proper security are prompted about any discrepancies outside of set tolerances, and SIM can automatically force a recount if the discrepancies are too high. The system uses discrepancy thresholds (established in product group setup) based on a percentage or standard unit of measure by the item class in the merchandise hierarchy.

Unit Stock Count Product Groups

For unit-only stock counts, you can set up Unit type stock count product groups. You can include individual items and item hierarchies.

A Unit product group can be scheduled for a stock count on a specified day or at scheduled intervals such as daily, weekly, monthly, or annually. One or more stores can be assigned to the scheduled stock count. When the stock count is extracted, a stock count item list is generated at the store level through a batch process.

When the stock count is performed, users with proper security are prompted about any discrepancies outside set tolerances, and SIM can automatically force a recount if the discrepancies are too high. SIM uses discrepancy thresholds, established in a separate setup process, that are based on a percentage or standard unit of measure for the item class in the merchandise hierarchy.

You can authorize stock counts with items that are discrepant, based on percentage or standard unit of measure thresholds. When authorized item quantities that are entered differ from the stock on hand, SIM creates inventory adjustments.

Unit and Amount Stock Count Product Groups

A Unit and Amount product group can be scheduled on a specified day and is restricted to Merchandise Hierarchy setup. One or more stores can be assigned to the scheduled stock count. A stock count is generated at the store level through a batch process that runs daily.

When the stock count is performed, users with proper security are notified about any discrepancies outside of set tolerances, and SIM can automatically force a recount if the discrepancies are too high.

Wastage Product Groups

Wastage is the process through which inventory is lost over time. Spoilage of fresh produce is an example of wastage, another example is the evaporation of water in meat held in cool storage. You can create wastage product groups to maintain more accurate inventory. Individual items or item hierarchies can be included in a wastage product group.

A wastage product group can use a variance percentage or standard unit of measure amount. You can schedule when a wastage product group batch process is run. Inventory adjustments are made automatically, based on the variances set up in the product group.

Note: If a wastage product group includes any items with unique identification numbers (UIN), those items are not processed by the wastage product group batch process.

A second type of wastage exists that reduces inventory based on sales, for example deli ham where fat is trimmed off of the ham before the slices are sold. This is calculated during the sales process update in SIM.

Counting Methods for Stock Counts

For stock count product groups, you can specify the counting methods that you use. Counting methods include third-party counts (count data imported from another system), and guided or unguided counts. See *Oracle Retail Store Inventory Management Stock Counts Overview* white paper Note 1541449.1 in My Oracle Support for more information.

Third-Party Counts

For a Problem Line, Unit, or Unit and Amount stock count product group. This method requires a system different than SIM to perform the count. The count result data is imported into SIM for comparison against SIM inventory levels.

Third-party counts can include inconsistencies that can be resolved within SIM. Items might be counted that are not currently recorded in SIM inventory. Some counted items might not be currently ranged to the store and are not expected to appear in the count. You can assign item IDs to items not on file, and you can include nonranged items in the stock count.

Some items counted in a third-party stock count might be items that are not included in the stock count product group and should not have been counted. Counts for these items are flagged as rejected not on count items, and they cannot be assigned SIM item IDs. No action can be taken with these items.

Third-party counts can also automatically take a snapshot and be approved, depending respectively on input parameters and configuration settings.

Guided Counts

A guided count requires that your store has sequenced at least one item in a location. If you use sequencing, a guided stock count product group organizes the count by location. If you use sequencing, you have the option to perform a guided or unguided

count, except for third-party counts. Guided counting improves the efficiency of the count by guiding your personnel from one item to the next within a selected location using the sequence you have defined. The guided/unguided choice does not apply to third-party counts.

Note: If any items are not assigned to locations, they are categorized as No Locations items, and you will be prompted in order of ascending item ID when counting those items.

See [Chapter 13, "Sequencing"](#) for more information.

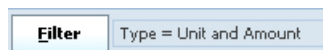
Unguided Counts

In an unguided count, items at a location can be counted and the count results entered in any order. If you do not use sequencing or third-party counting, the stock count must be an unguided count. (For third-party counts, the guide/unguided choice does not apply, because the count is conducted using a third-party system.)

Filter the Product Group List

The Product Group List window displays records that have been created for the store with which the user is associated, including those created for all stores. The product groups are listed by type, then by ID.

At any time while the Product Group List window is open, you can change how the list is filtered. Current filtering is displayed next to the Filter button on the Product Group List window. If no filtering is displayed, all product groups are currently selected and listed.



To filter the product groups listed in the Product Group List window, follow these steps:

Navigate: Main Menu > Admin > Product Group. The Product Group List window opens.

1. Click **Filter**. The Product Group Filter window opens.

Figure 3–2 Product Group Filter Window

2. Enter or select search values as needed to specify the product groups that you want to list. All values are optional. If you leave a field blank or select All, all values are included in the search.

Hierarchy Filters – Select **Dept**, **Class**, and **Sub-Class** values as needed to limit the product groups to list. By default, all departments, classes, and subclasses will be selected.

Additional Filters – Enter or select values for these fields:

- **Type** – Select the type of product group, or All (default).
- **Description** – Enter the description of the product group. The search will find all product groups for which the description contains the value you enter.
- **Store** – Select the store for which you want to list the product groups. You can select any store for which you have permissions.
Select All Stores to view product groups that apply to all stores.
- **Item** – If you specify an item, product groups that contain that item will be listed. Enter the item number or click the **Ellipsis** button to look up the item.

3. Click **Apply**. You return to the Product Group List window, where your filter has been applied.

Create a Product Group

Follow this procedure to define the attribute and components of any type of product group.

Review the following topics before you begin to create product groups:

- [Product Group Types](#)
- [Counting Methods for Stock Counts](#)
- [Product Group Size Limits](#)

Navigate: Main Menu > Admin > Product Group. The Product Group List window opens.

Procedure

Creating any type of product group is a three-part procedure. You must complete all parts of the procedure to save the new product group.

1. [Enter Product Group Detail](#)

The Product Group Detail section of the Product Group Detail window includes the product group type, description, and other attributes that must be completed for any type of product group.

2. Enter product group attributes specific to the type of product group you are creating:

- [Enter Ticketing Detail](#)
- [Enter Item Request Detail](#)
- [Enter Replenishment Detail](#)
- [Enter Stock Count Detail](#)
- [Enter Wastage Detail](#)

For any type of product group, SIM enables only the fields that apply to that type.

3. [Define Product Group Components](#)

For all product group types, select the components that are included in the product group by merchandise hierarchy, item, supplier, or promotion.

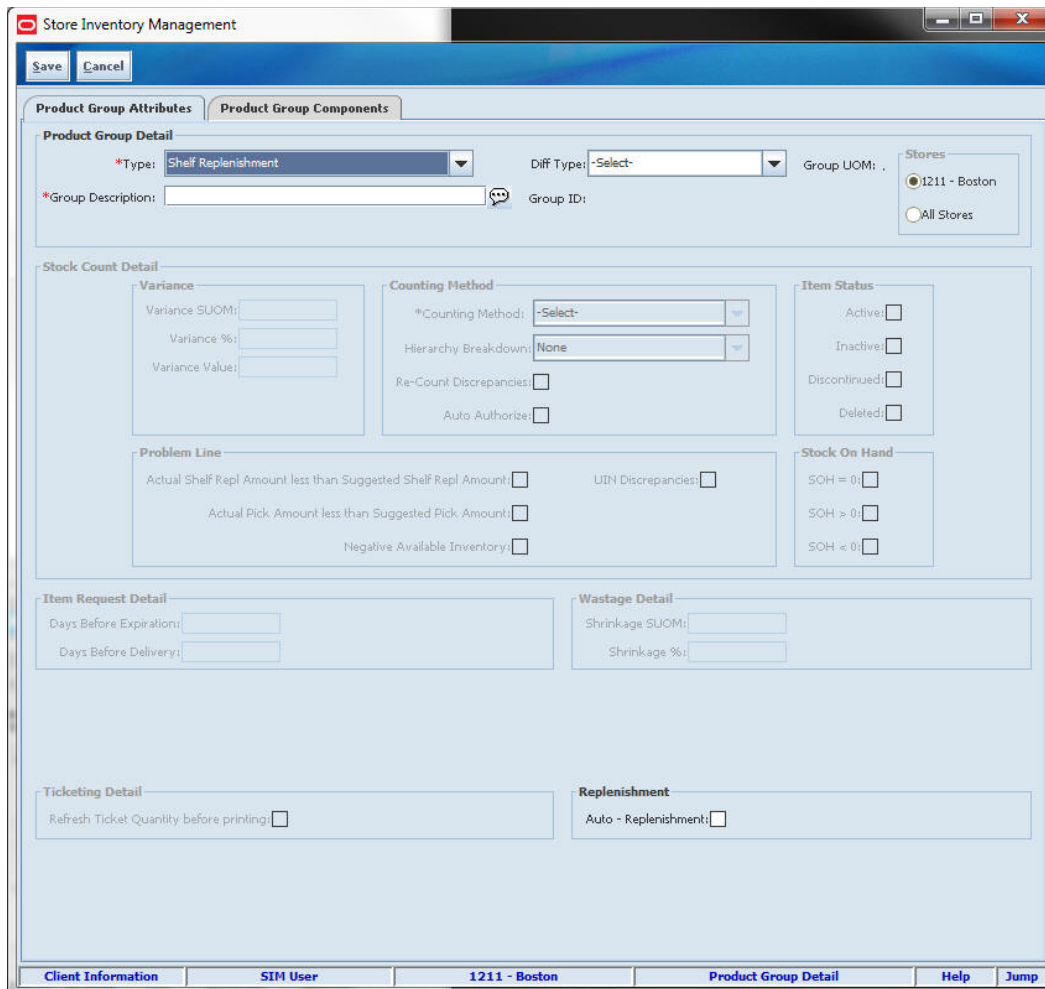
After you have created a product group, you create a schedule for the product group to specify how often it is processed. See [Chapter 4, "Product Group Scheduler."](#)

Enter Product Group Detail

For any type of new product group, first complete the fields in the **Product Group Detail** section:

1. Click **Create**. The Product Group Detail window opens to the Product Group Attributes tab.

Figure 3–3 Product Group Detail Window – Product Group Attributes Tab



2. Select the type of product group from the Type drop-down list (see “[Product Group Types](#)” for more information):
 - **Auto Ticket Print** – To create a product group to generate an automatic printing of tickets.
 - **Item Request** – To create a product group to generate item request lists for ordering inventory.
 - **Problem Line** – To count items that have been flagged as having a defined inventory position problem.
 - **Shelf Replenishment** – To create a product group to generate shelf replenishment items.
 - **Unit** – To create a unit-only stock count product group.
 - **Unit and Amount** – To create a unit and amount (value) stock count product group.
 - **Wastage** – To create a wastage only product group.
3. In the **Diff Type** drop-down list, select a type.
4. In the **Group Description** field, enter a brief explanation of the product group.

5. If you want the product group to apply to other stores, select the **All Stores** radio button in the Stores section. This will allow you to schedule the product group for more than one store.

By default, a new product group includes only the store for which you are currently logged in.

After you have completed the Product Group Detail section, continue to enter the attributes of the type of product group you are creating:

- [Enter Ticketing Detail](#)
- [Enter Item Request Detail](#)
- [Enter Replenishment Detail](#)
- [Enter Wastage Detail](#)
- [Enter Stock Count Detail](#)

Enter Ticketing Detail

For an Auto Ticket Print product group only, select the Refresh Ticket Quantity before Printing check box in the **Ticketing Detail** section, if applicable.

When you have completed the Ticketing Detail section, proceed to [Define Product Group Components](#).

Note: Scheduling is performed in the [Product Group Scheduler](#) screen.

Field	Description
Refresh Ticket Quantity before printing	Refreshes the ticket quantities with the current stock on hand for the item tickets and populate label quantities in sequencing for the shelf edge labels.

Enter Item Request Detail

For an Item Request product group only, enter values for the following fields in the **Item Request Detail** section.

When you have completed these fields, proceed to [Define Product Group Components](#).

Field	Description
Days Before Expiration	The number of days in which the items must be requested. If the items have not been requested in this period, the item requests will be cancelled. This value is not required.
Days Before Delivery	The number of days in which the requester wants the items delivered. This value is not required.

Enter Replenishment Detail

For shelf replenishment product group only, select the **Auto-Replenishment** checkbox in the Replenishment Detail section if you want the system to automatically calculate the quantity to replenish on the sales floor.

When you have completed this field, proceed to "[Define Product Group Components](#)."

Field	Description
Auto-Replenishment	Adjusts the shop floor quantity during the nightly batch, to the item shelf capacity (if setup in sequencing) or the available inventory, whichever is less.

Enter Wastage Detail

For a Wastage product group only, enter a value in at least one of these fields in the **Wastage Detail** section.

You can schedule when the Wastage product group batch is run. When the batch runs, SIM generates inventory adjustments based on the shrinkage units or shrinkage percent entered for the product group.

When you have completed these fields, proceed to [“Define Product Group Components.”](#)

Field	Description
Shrinkage SUOM	Number of units that will be written off if the available stock on hand is greater than zero. SIM will generate an inventory adjustment for this number of units.
Shrinkage %	The quantity percent that will decrease the inventory each time this product group is scheduled. SIM will generate an inventory adjustment for this quantity.

Enter Stock Count Detail

For a Unit, Unit and Amount, or Problem Line product group, enter the attributes that apply to the type of stock count group you are creating. The following table defines the fields and indicates which fields apply to different stock count types.

When you have completed these fields, proceed to [“Define Product Group Components.”](#)

Field	Description	Problem Line	Unit	Unit and Amount
Variance				
Variance SUOM	Maximum allowable number of units, expressed in the standard unit of measure (SUOM), that the count can vary from the system stock on hand level before it is considered a discrepancy. If the variance units are equal to or greater than the Variance SUOM set, plus or minus, the stock count is discrepant.	X	X	X
Variance %	Maximum allowable percentage of units counted that the count can vary from the system stock on hand level before it is considered a discrepancy. If the variance percent is equal to or greater than the Variance % set, plus or minus, the stock count is discrepant. For example, if the Variance % is set to 10, and stock on hand is 20, a stock count of 18 is discrepant because $2/20 = 10$ percent. A stock count of 19 is not discrepant, because the variance is less than 10 percent.	X	X	X

Field	Description	Problem Line	Unit	Unit and Amount
Variance Value	A money amount that will be compared to the number of discrepant units times the current unit retail of the goods. (SIM uses current retail from item lookup, not an extracted promotion or clearance price.) If the variance money amount is equal to or greater than the Variance Value set, plus or minus, the stock count is discrepant.			X
Counting Method	Select Third-party, Guided, or Unguided. For more information, see Counting Methods for Stock Counts .	X	X	X
Hierarchy Breakdown	Select None (default), Location, Department, Class, or Subclass. Note: Guided counts are always by location.	X	X	X
Re-Count Discrepancies	If this check box is selected, a stock recount record is created if there are any discrepant items in a stock count. The recount must be completed before the stock count can move to the authorization process. A new snapshot cannot be taken during the recount process for a unit and amount stock count. During a unit and problem line count, the user has the ability to take a new snapshot. Note: This feature is not available for third-party count method.	X	X	X
Auto Authorize	If this check box is selected, the stock count is automatically authorized by SIM when the count or recount is completed. For third-party counts, the count is automatically authorized when the count data is imported into SIM.	X	X	X
Item Status				
Item Status	For Unit count product groups only, you must select at least one status of items to include when the stock count is extracted. Select all that apply to the group you are creating. <ul style="list-style-type: none"> ■ Active ■ Inactive ■ Discontinued ■ Deleted 		X	
Problem Line				
Actual Shelf Repl Amount Less Than Suggested Shelf Repl Amount	If this check box is selected, SIM adds an item to the problem line stock count if the amount entered for the item on the shelf replenishment list was less than the suggested shelf replenishment amount.	X		
Actual Pick Amount Less Than Suggested Pick Amount	If this check box is selected (default), SIM adds an item to the problem line count if the actual pick amount entered for the item on the pick list was less than the suggested system pick amount for the customer order pick list.	X		
Negative Available Inventory	If this check box is selected (default), SIM adds an item to the problem line stock count if the item has negative available inventory.	X		

Field	Description	Problem Line	Unit	Unit and Amount
UIN Discrepancies	If this check box is selected (default), the product group requires counting of all unique identification number (UIN) discrepancies for the product group components. UIN discrepancies are differences between the stock on hand and the UINs registered at the store. UIN discrepancies can result from shipping or selling items with incorrect serial numbers, or manually changing the status of a serial number. See Chapter 5, "Unique Identification Numbers (UIN)" for information about UINs.	X		
Stock on Hand				
Stock on Hand	<p>For Problem Line and Unit stock count groups, select values for the check boxes that are enabled in the Stock on Hand section:</p> <ul style="list-style-type: none"> ■ For Problem Line groups, the SOH < 0 (negative stock on hand) check box is selected by default. You can deselect this check box if you do not want to count items with negative stock; if so, however, you must select at least one check box in the Problem Line section before you complete the product group. <p>The SOH = 0 and SOH > 0 check boxes are deselected for Problem Line groups and cannot be changed.</p> <ul style="list-style-type: none"> ■ For Unit groups, all check boxes are selected by default. You can deselect any of the check boxes; however, you must select at least one. 	X	X	

Define Product Group Components

For any type of product group, follow these steps to define what is included in the product group:

1. Click the **Product Group Components** tab.

Figure 3-4 Product Group Detail Window – Product Group Components Tab

2. In the **New Product Group Element** section, select a radio button to specify how you will select components for the product group. The following table shows the options available for different product group types.

Product Group Type	Hierarchy	Item	Supplier	Promotion ID	All Departments
Auto Ticket Print	X	X	X	X	
Item Request	X	X	X	X	
Problem Line	X	X	X	X	X
Shelf Replenishment	X	X	X	X	
Unit	X	X	X	X	X
Unit and Amount	X				X
Wastage	X	X	X	X	

3. For each component you want to add to the group, follow these steps:
 - a. Select the product component as follows, depending on the radio button you have selected.

Hierarchy – Select a hierarchy from the drop-down lists in the **Department**, **Class**, and **Sub-Class** fields.

Item – In the **Item** field, enter the item number, or click the **Ellipsis** button to look up the item. In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Product Group Detail window. See [Item Lookup](#) in [Chapter 20](#) for more information.

Supplier – In the **Supplier** field, enter the supplier ID, or click the **Ellipsis** button to look up the supplier. In the Supplier Lookup window, locate and select the supplier you want. Click **Apply** to return to the Product Group Detail window. See [Supplier Lookup](#) in [Chapter 20](#) for more information.

Promotion ID – Enter the promotion ID in the **Promotion ID** field.

All Departments – No additional selection steps are needed.

- b. Click **Add to Group**. The selection is added to the group.

Note: On the Product Group Components tab, **Recommended # of Items** shows the recommended total number of items for a product group, and **Total # of Items in Group** shows the number of items currently in the group. See [Product Group Size Limits](#) for more information.

4. If you want to remove a component that you have added, follow these steps:
 - a. Select the component from the list.
 - b. Click **Delete From Group**. The selection is deleted from the group.
5. Click **Save** to save the new product group and return to the Product Group List window.

Edit a Product Group

Edit a product group to change its attributes or components.

Navigate: Main Menu > Admin > Product Group. The Product Group List window opens.

To edit a product group, follow these steps:

1. Double-click on the group that you want to edit. The Product Group Detail window opens.
2. Update attributes as needed, or add and remove components. See [Create a Product Group](#) for more information.
3. Click **Save**. You return to the Product Group List window.

Delete a Product Group

Note: You can delete only those product groups that are not assigned to a schedule.

Navigate: Main Menu > Admin > Product Groups. The Product Group List window opens.

To delete product groups, follow these steps:

1. Select the product groups that you want to delete.
2. Click **Delete**. A message is displayed: “Are you sure you want to delete the selected product group?”
3. Click **Yes**.

Product Group Size Limits

Product groups can contain thousands of line items. SIM can handle product groups that contain very large numbers of line items, but they can be difficult for a user to manage. Because of this, SIM automatically breaks down large product groups into multiple smaller records.

The system administrator can set system options to control the maximum number of line items included in different types of product groups. If these options are not set, the SIM system default limit is used.

If the number of line items in a product group exceeds the maximum line item limit, SIM breaks down the product groups into smaller sections. See the *Oracle Retail Store Inventory Management Implementation Guide* for information about the system options that control size and breakdown of large product groups.

Automatic Breakdown of Large Product Groups

For Unit, Unit and Amount, and Problem Line stock count groups, SIM breaks down the stock count first by department, then by class, then by subclass:

- If the number of line item records for a department exceeds the maximum line limit value, then SIM breaks down the department into smaller sections starting with class.
- If a single class has more line items than the user interface limit, SIM breaks down the class to the subclass level.

It is possible for a department to have some counts at the class level and others at the subclass level, depending on how many line items there are at each level.

For Unit and Amount counts, SIM does not break down the count lower than the subclass level. A further breakdown could have an adverse effect on company financials. If a single subclass exceeds the maximum line item limit, the subclass is extracted as its own child stock count transaction.

For guided counts, SIM breaks the count into child counts by location.

For Unit and Problem Line counts, if a subclass exceeds the limit, it is further broken down into groups that contain no more than the maximum number of line items allowed. The breakdown of the subclass is based on ascending item ID.

Later in this section, an example shows how SIM breaks down a large stock count.

Child Descriptions

For any product group that exceeds the limit, SIM creates multiple child records and appends " (x/y) " to the description. This indicates that more than one child record is associated with the original master product group, where:

- x is the sequence number of the child record
- y is the total number of child records into which the product group is divided

For example, for a Batteries stock count broken down into six separate child stock count records, the description of the first stock count record of the group would be shown as follows:

- On the PC: Batteries (1/6)
- On the handheld: (1/6) Batteries

On the PC, multiple records associated with the same master product group are sorted based on ascending Department/Class/Subclass order, with (x/y) appended after the count description. For example, a large stock count might be broken down as follows, with the following child count records as listed:

Stock Count Record Breakdown

Batteries (1/6)	Contains Dept A items
Batteries (2/6)	Contains Dept B Class 1
Batteries (3/6)	Contains Dept B Class 2
Batteries (4/6)	Contains Dept B Class 3, 4
Batteries (5/6)	Contains Dept B Class 5 Subclass 1
Batteries (6/6)	Contains Dept C

On the handheld, multiple records associated with the same master product group are sorted based on ascending Department/Class/Subclass order, with (x/y) appearing before the count description (because of display space limits on the handheld). For example, the same records would be displayed on the handheld as follows:

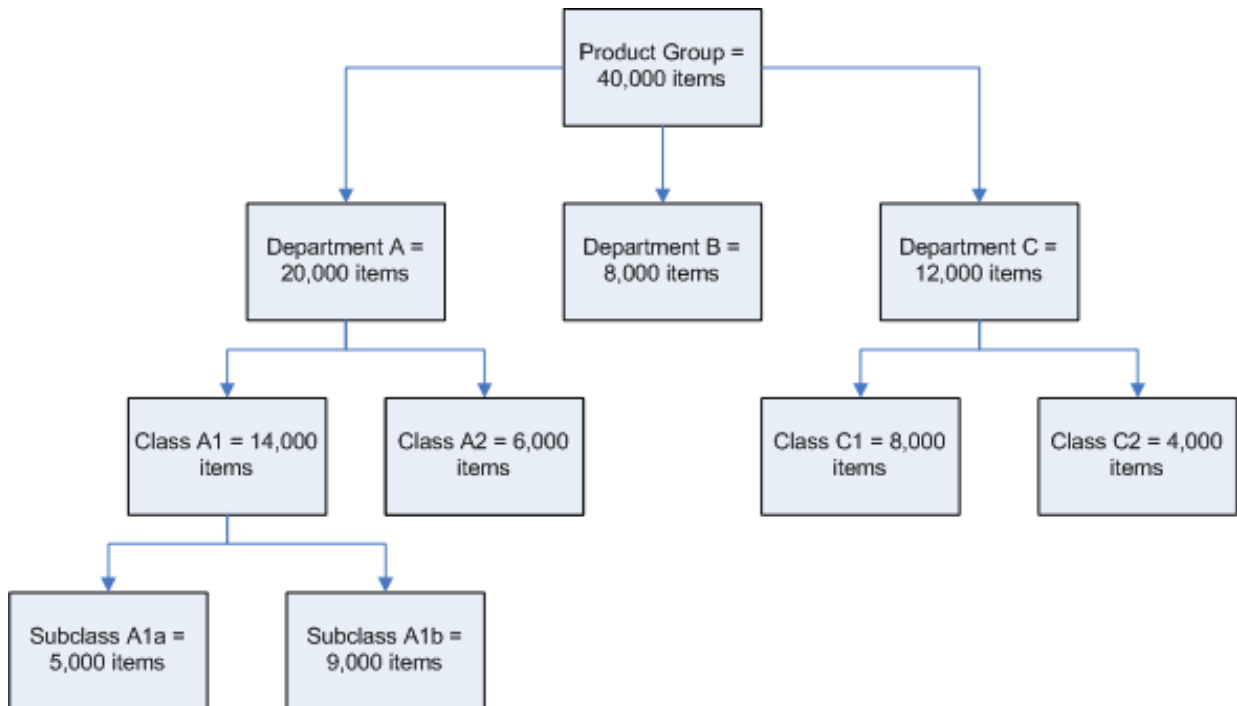
1-(1/6) Batteries
2-(2/6) Batteries
3-(3/6) Batteries
4-(4/6) Batteries
5-(5/6) Batteries
6-(6/6) Batteries

Note: Child stock counts on the handheld are not always grouped together on the stock count list screen, because the numbers appear before the description and affect how the records are sorted.

Example

The following figure shows how SIM automatically breaks down a large stock count. In this example:

- The maximum number of line items is 10,000
- The total number of items in the product group is 40,000



In this example, the product group exceeds the maximum limit of 10,000 line items and must be broken down into smaller sections:

SIM first breaks down the count by department. If a department has 10,000 or fewer line items (like Department B in the example), the department does not need to be broken down. It is extracted into its own child count record.

If a single department exceeds the 10,000 line items limit, SIM breaks down the count further to the class level. If none of the classes exceed the maximum line items limit (like Class C1 and Class C2 in the example), SIM extracts each class as a single child count record.

If a class exceeds the maximum line limit (like Class A1 in the example), SIM breaks down that class to the subclass level.

Product Group Scheduler

Use the Product Group Scheduler to create schedules for these types of product groups:

- Auto Ticket Print product groups
- Unit stock count product groups
- Unit and Amount stock count product groups
- Problem Line stock count product groups
- Item Request product groups
- Shelf Replenishment product groups
- Wastage product groups

Product Group Schedule List Window

Navigate: Main Menu > Admin > Product Group Scheduler. The Product Group Schedule List window opens.

Figure 4–1 Product Group Schedule List Window

ID	Description	Group	Next Date	Final Date	Status	Store
2461	bjm item req	2582 - BJM test		6/28/13	Open	1111
2641	test	2762 - test1		7/2/13	Open	1111
2661	test	2782 - testgs1		7/3/13	Open	1111
2802	SJT Pack NONS	2903 - SJT Non-Sella...		7/11/13	Open	1111
2901	my item request	2982 - my item request		7/15/13	Open	1111
2961	stock count	3042 - stock count		7/18/13	Open	1111
3482	test997	3542 - Retest997		8/2/13	Open	1111
3481	retest997	3542 - Retest997		8/2/13	Open	1111
3062	the	1066 - Pck Mult C		7/31/13	Open	1111
3086	test	3146 - testpack		7/22/13	Open	1111
3161	HH- SPI N and Sellable	3222 - HH- SPI N- S...		7/23/13	Open	1111
21	defect 7-8	1 - Defect 7	1/1/14	1/1/15	Open	1111
3061	retest	102 - Unit Count		7/31/13	Open	1111
2601	pgs1	2742 - tt1		7/1/13	Open	1111
3121	test	3182 - Wastagedeptc...		7/23/13	Open	1111
3141	test	3202 - wastagesubclass		7/23/13	Open	1111
3202	test	3263 - multistorewast...		7/24/13	Open	1111
3363	pr TEST 2 sUE	3384 - OPr TEST 2		7/29/13	Open	1111
3461	SUe UIN Test - Wast...	3482 - UIN Test		7/31/13	Open	1111
3541	Sue/Heidi	3602 - Sue/Heidi test		8/5/13	Open	1111
3601	Print Recount test a	3682 - test print reco...		8/8/13	Open	1111
2581	ragav test	1342 - 1	8/19/13	6/26/14	Open	1111
2622	test test	2322 - item request		7/30/13	Open	1111
2921	efsf	2322 - item request		7/16/13	Open	1111
3262	Promotion test 1	2983 - Promotion ID ...		7/25/13	Open	1111
3101	test	3162 - wastagedept		7/23/13	Open	1111
3183	test	3243 - test		7/23/13	Open	1111
3743	Defect PR test	3383 - Problem Line ...		8/15/13	Open	1111

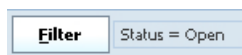
From the Product Group Schedule List window, you can do the following:

- [Filter the Product Group Schedule List](#)
- [Create a Product Group Schedule](#)
- [Edit a Product Group Schedule](#)
- [Delete a Product Group Schedule](#)

From the Product Group Schedule List window, click **Back** to return to the Admin menu.

Filter the Product Group Schedule List

At any time while the Product Group Schedule List window is open, you can change how the list is filtered. Current filtering is displayed next to the Filter button. If no filtering is displayed, all product group schedules are currently selected and listed.



Navigate: Main Menu > Admin > Product Group Scheduler. The Product Group Schedule List window opens.

To filter the product group schedules listed, follow these steps:

1. Click **Filter**. The Product Group Schedule Filter window opens.

Figure 4–2 Product Group Schedule Filter Window

2. Enter or select search values as needed to specify the product group schedules that you want to list. All values are optional. If you leave a field blank or select All, all values are included in the search.

Date Filters – You can select records based on Next Schedule Date, Final Schedule Date, or both.

Note: Selection by date does not select records within a data range. The records selected are those that match the Next Schedule Date or Final Schedule Date (or both) that you enter. This selection step is intended to find schedules for specific days. For example, you may want to find all records that are scheduled for tomorrow, so that you can plan staffing as needed.

Data filtering works as follows:

- If you enter a value for Next Scheduled Date, the search finds only the records where the next scheduled extraction date is the specified date.
- If you enter a value for Last Scheduled Date, the search finds only the records where the final scheduled extraction date is the specified date.
- If you enter values for both Next Scheduled Date and Last Scheduled Date, the search returns only records where both dates match the dates you enter.

Additional Filters – Enter or select values for these fields:

- **Type** – Select the type of product group, or All (default).
 - **Description** – Enter the description of the product group. The search will find all product groups for which the description contains the value you enter.
 - **Store** – Defaults to store currently logged in, contains all stores for user.
 - **Status** – Select All, Open (default), or Closed.
3. Click **Apply**. You return to the Product Group List window, where your filter has been applied.

Create a Product Group Schedule

Navigate: Main Menu > Admin > Product Group Scheduler. The Product Group Schedule List window opens.

To create a new product group schedule, follow these steps:

1. Click **Create**. The Product Group Schedule Detail window opens.

The screenshot shows the 'Store Inventory Management' application window. The main area is titled 'Product Group Schedule Detail'. It contains several input fields: 'Schedule ID', 'Description', 'Product Type' (a dropdown menu), 'Product Group' (a dropdown menu), 'Start Date', and 'End Date'. Below these is a 'Locations' section with two panes: 'Available Locations' and 'Selected Locations', with navigation buttons between them. At the bottom is a 'Schedule' section with radio buttons for 'Daily', 'Weekly', 'Monthly', and 'Yearly', and a group of radio buttons for 'Every' with a dropdown set to '1' and the unit 'day(s)', and an option for 'Every Weekday'. The status bar at the bottom shows 'Client Information', 'orsimadmin orsimadmin', '1111 - Charlotte 11*', 'Product Group Schedule Detail', 'Help', and 'Jump'.

2. In the **Description** field, enter a brief explanation of the schedule.
3. Select values for the following fields:
 - Product Type** – Select the type of product group (Auto Ticket Print, Item Request, Problem Line, Unit, Unit and Amount, Wastage, Shelf Replenishment).
 - Product Group** – Select the product group for this schedule.
4. Enter or select dates for the following fields:
 - Start Date** – Select the date on which you want the schedule to begin.
 - End Date** – Select the date on which you want the schedule to stop.

Note: For a unit and amount stock count product group, no End Date value is set and the field is disabled. For unit stock count, item request, and problem line stock count groups, if the start date is set for today, you have the option to extract the event immediately.

5. In the Available Locations list, select the locations to include in the schedule.

Note: If the selected product group uses third-party stock counts, only stores that are set up to allow third-party stock counts are displayed in the Available Locations list. This list contains multiple stores only if you have privileges for multiple stores.

6. Click the right-arrow button to move the selected locations to the Selected Locations list.

If you want to select all locations, click the double-right-arrow button.

To remove locations from the Selected Locations list, use the left-arrow or double-left-arrow button.

7. Under **Schedule**, select a radio button to schedule a daily, weekly, monthly, or yearly count, a count performed every weekday, or a count performed on some other schedule you specify.

For unit and amount or problem line stock count groups, the only option is Daily.

8. Click **Save** to return to the Product Group Schedule List window, where the new schedule is displayed.

Edit a Product Group Schedule

You can edit details of any product group schedule with a status of Open. You can view schedules with status Closed, but you cannot edit them.

Navigate: Main Menu > Admin > Product Group Scheduler. The Product Group Schedule List window opens.

To edit a product group schedule, follow these steps:

1. Double-click on the schedule that you want to edit.
2. Update any enabled fields as needed to change the description, dates, locations, or schedule.

See [Create a Product Group Schedule](#) for more information about product group schedule fields.

3. Click **Save** to return to the Product Group Schedule List window, where the revised schedule is displayed.

Delete a Product Group Schedule

Delete product group schedules that are no longer needed.

Navigate: Main Menu > Admin > Product Group Scheduler. The Product Group Schedule List window opens.

To delete product group schedules, follow these steps:

1. Select the product group schedules that you want to delete.
2. Click **Delete**. A message is displayed: "Are you sure you want to delete the selected schedule?"
3. Click **Yes**. The selected product group schedules are deleted.

Unique Identification Numbers (UIN)

Retailers who sell items such as electronics, cell phones, firearms, and limited edition items often have to track unique numbers for a single item or group of items. These identifiers might be serial numbers, unique identification numbers, FCC IDs, International Mobile Equipment Identity (IMEI) numbers, or other kinds of identifiers. Unique identification numbers aid the retailer in tracking expensive or controlled items, or items that may be subject to manufacturer recalls or investigations by legal authorities.

SIM provides the capability to track items by unique identification numbers (UIN). SIM system configuration options control whether UIN capabilities are available in your SIM system.

If you use unique identification numbers, these numbers are displayed and tracked in a number of functional areas in SIM, including deliveries, transfers, returns, and stock counts. You can also look up items by UIN.

If UINs are required for an item, the UINs must be scanned, entered, or automatically generated when stock is received. When you are generating UINs for tracking items, you can print labels with the generated UINs. UINs must also be recorded when stock counts are performed, when inventory adjustments are done, or when items are shipped.

Set Up UIN Attributes

If an external system is not managing the UIN attributes, you can set up UIN attributes at the class level in SIM. The attributes are assigned to each item/location for all items within the class for a specific store.

UINs can be of these types:

- Serial number
Serial numbers are unique identifiers for individual instances of an item, typically attached to items by the manufacturer. During receiving, the serial numbers must be scanned and associated with items.
- Auto Generate SN (AGSN)
AGSNs are serial numbers generated by SIM that you can use to identify each instance of an item. SIM can also print item labels that contain the unique AGSNs.

See [Set Up UIN Attributes](#).

UIN Resolution List

SIM identifies discrepancies in UINs such as the return of a UIN still in stock, items received that are already at another location, or other problems. When irregularities are detected, SIM creates UIN exception records.

The UIN Resolution List allows you to view the audit records for UIN exceptions. You can identify the UINs for which resolution actions are required. A resolution action might be an inventory adjustment, transfer, or other action that resolves the exception. In some cases, a status change might resolve the exception.

Resolving UIN exceptions is a manual process. You must research the reasons for the errors and determine the appropriate actions to take.

See [UIN Resolution List](#).

Updating UINs

While you are performing some SIM tasks, you might need to update UINs for the items involved in the task (such as receiving, transfers, and stock counts). If your SIM system uses UINs, there are additional fields and windows in which UINs and counts are displayed, and in which you can add and correct UINs.

See [Updating UINs](#).

Item Lookup by UIN

In the Item Lookup function, you can look up an item by entering its UIN in the UIN field. Likewise, in the Container Lookup function, you can search for a container based on a UIN value.

In other SIM functions that allow item lookup, you can enter a UIN instead of a SIM item ID in the item identifier field, to find all items with that UIN.

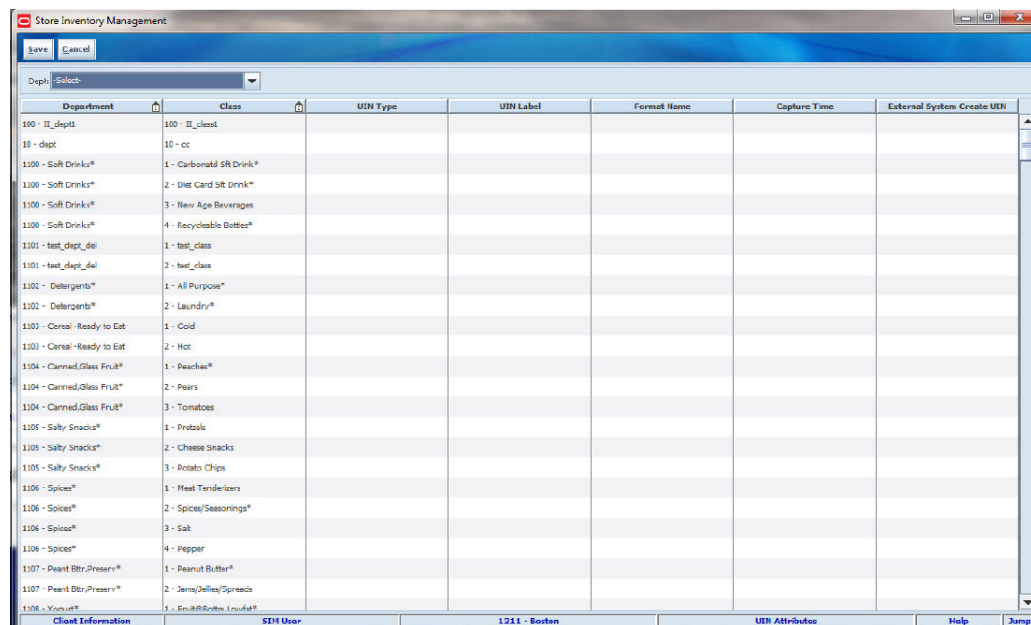
See [Item Lookup by UIN](#).

Set Up UIN Attributes

Use the UIN Attributes setup function to set up UIN attributes at class level in the merchandise hierarchy. The attributes are assigned to each item/location for all items within the class.

Navigate: Main Menu > Admin > Setup > UIN Attributes. The UIN Attributes window opens.

Figure 5–1 UIN Attributes Window



To set up UIN attributes, follow these steps:

1. To list only the classes for one department, select a department from the **Department** drop-down list.
2. For each class for which you want to set up UIN attributes, follow these steps:
 - a. In the **UIN Type** field, select the type of UIN that applies to this class. The types available are Serial Number and AGSN.
 - b. In the **UIN Label** field, select the label that applies to this UIN.

The UIN Label value is displayed whenever a description of the UIN is needed for an item. The UIN Label value is also used as a label to identify some fields in the user interface in which UINs are entered or displayed.

Note: The specific UIN labels in your SIM system are user-defined for your organization during SIM installation and setup. The UIN Label drop-down list provides all of the valid labels for your SIM system. Each of the valid labels represents a UIN of either serial number or AGSN type.

- c. In the **Format Name** field, if UIN Type is Auto Generate SN, select the ticket format to use when generating labels for this UIN.
- d. In the **Capture Time** field, select the first time that the UIN will be captured in SIM:

Sale – UINs are captured when individual items are sold. UINs for these items will not be tracked in SIM.

Store Receiving – UINs are captured or generated when stock is received from a warehouse or supplier. These UINs are tracked in SIM for any inventory transaction.

- e. In the **External System Create UIN?** field, select True or False to indicate whether an external system (such as a point-of-sale system) can create an UIN in SIM if the UIN does not exist. If Capture Time is Sale, this field is set to False and cannot be changed. When this field is set to True, a check mark appears in the field.
3. Click **Save** to save your changes and return to the Setup menu.

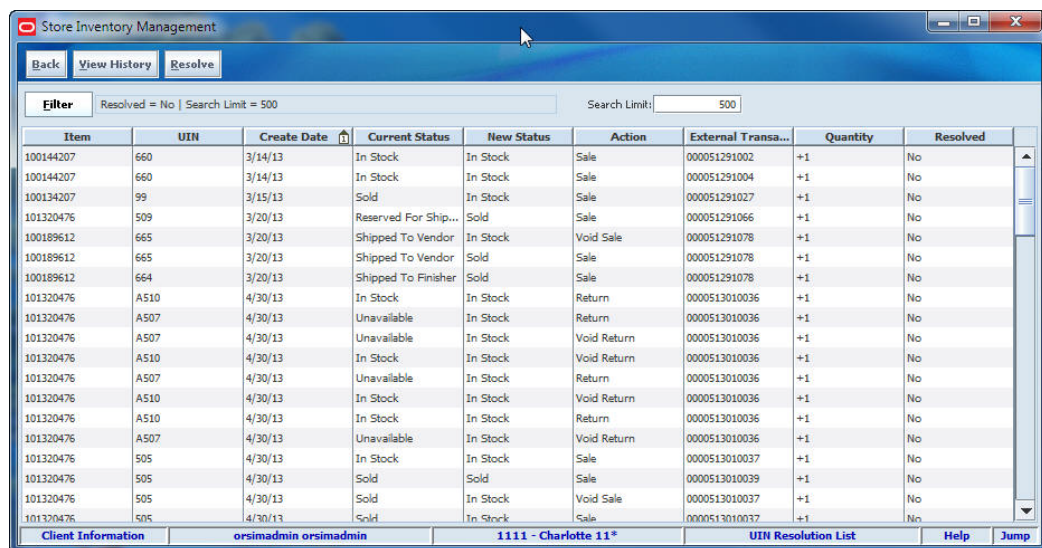
UIN Resolution List

Use the UIN Resolution List and its functions to view and update the UIN exception records that require your attention and resolution.

UIN Resolution List Window

Navigate: Main Menu > Admin > UIN Resolution. The UIN Resolution List window opens.

Figure 5–2 UIN Resolution List Window



You can use the **Search Limit** field to set the maximum number of results that you want returned. You can enter an integer from 1 to 999; the default is 500.

The UIN Resolution List window displays the following information about UIN exceptions:

Field	Description
Item	The item for which the conflict occurs.
UIN	UIN of the item for which the conflict occurs.
Create Date	Date the exception was created in SIM.
Current Status	Status of the UIN at the time the exception was raised. This could be different from the current SIM status. For example, the UIN could have been in In Receiving status when the update process tried to process it, but the receipt has been completed, so now the UIN is in In Stock status.
New Status	Proposed new status that SIM tried to apply to the UIN.

Field	Description
Action	Action within the UIN Update Status Web Service. This value can also be RUA for exceptions generated from receiver unit adjustments.
External Transaction ID	Unique identifier of the transaction that links back to an external system.
Quantity	For RUAs, the adjustment quantity. The value is prefaced with either + (increase) or - (decrease).
Resolved	Yes or No to indicate whether the UIN has been resolved.

From the UIN Resolution List window, you can do the following:

- [Filter the UIN Resolution List](#)
- [View History and Update UIN Status](#)
- [Mark UIN Exceptions Resolved](#)

From the UIN Resolution List window, click **Back** to return to the Admin menu.

Filter the UIN Resolution List

At any time while the UIN Resolution List window is open, you can click **Filter** to change how the list is filtered.

Current filtering is displayed next to the Filter button on the UIN Resolution List window. If no filtering is displayed, all unresolved UIN exceptions are currently listed.

To change how the list is filtered, follow these steps:

1. Click **Filter**. The UIN Resolution Filter window opens.

Figure 5–3 UIN Resolution Filter Window

2. Enter or select values for the search criteria to find only those UIN exceptions that meet all criteria you specify. You can search by any of the following criteria:

Item – Specific item identifier. Enter the item number, or click the [Ellipsis](#) button to look up the item.

In the Item Lookup window, enter search criteria as needed to find the item you want. (See [Item Lookup](#) for more information about item lookup criteria.) Select the item you want and click **Apply** to return to the UIN Resolution Filter window.

UIN – Enter a specific UIN.

Existing Status – Select the UIN status for the item when the resolution record was written.

Create Dates: From and To – Enter or select dates to find only those UIN exception records in a particular date range.

Resolved – Select All, Resolved, or Not Resolved.

Search Limit – You can use this field to set the maximum number of records that you want returned. You can enter an integer value from 1 to 999; the default is 500.

3. Click **Apply**. The UIN exceptions that meet your search criteria are listed in the UIN Resolution List window.

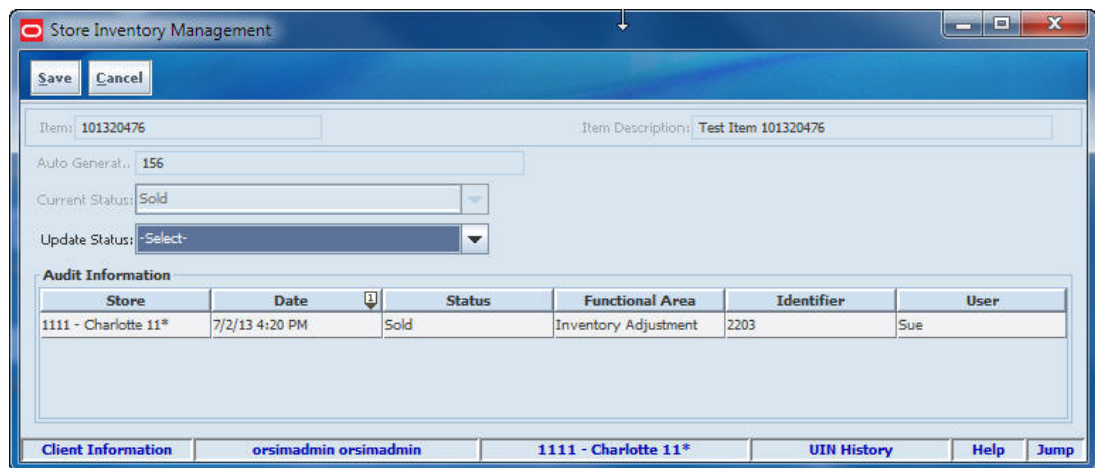
View History and Update UIN Status

Note: You must have separate permissions to view UIN history or update UIN status.

To view the history of a UIN, and optionally update the status of a UIN exception, follow these steps:

1. In the UIN Resolution List window, select a UIN.
2. Click **View History**. The UIN History window opens.

Figure 5–4 UIN History Window



The Audit Information displays the following audit trail information about the UIN:

Field	Description
Store	Store for which the audit information was captured
Date	Date the status change occurred
Status	Status of the UIN on the date shown
Functional Area	Functional area of SIM that generated the status change (for example, Warehouse Delivery, Stock Count, Sale, Update Status UI)

Field	Description
Identifier	Identifier of the transaction from the functional area that generated the status change
User	User who performed the action that generated the status change

3. (Optional) In the **Update Status** field, select the new status of the UIN.
4. Click **Save** to return to the UIN Resolution List window.

Mark UIN Exceptions Resolved

After you have resolved a UIN exception, you can mark the exception record as resolved.

Note: Marking the exception as resolved does not resolve a UIN exception. It removes the exception from the list of unresolved exceptions, and it also marks the record for later deletion during normal SIM processing.

To mark UIN exception records as resolved, follow these steps:

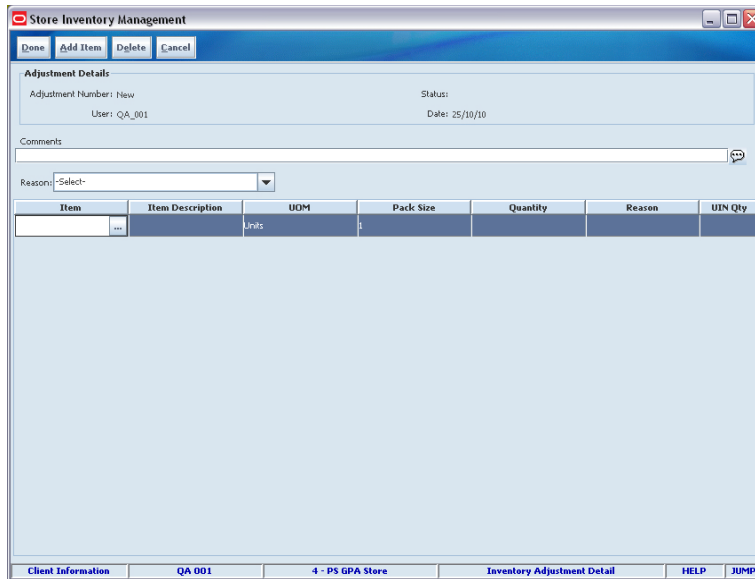
1. Select the UIN exception records that you want to mark as resolved.
2. Click **Resolve**. You receive a prompt: "Do you really want to confirm the selected records?"
3. Click **Yes**. The Resolved fields for the selected records are marked "Yes."

Updating UINs

While you are performing SIM tasks such as transfers, receiving, adjustments, and stock counts, you can add and update information about UINs. Numerous SIM functions require an accurate accounting of all UINs involved. The SIM interface has some standard fields and forms that work in a similar manner, regardless of the specific task.

For example, if you create an inventory adjustment for an item that requires a serial number type UIN, the Inventory Adjustment Detail form includes a UIN Qty field. This field shows the number of UINs included in the inventory adjustment. For an adjustment, you are required to enter all of the UINs that apply.

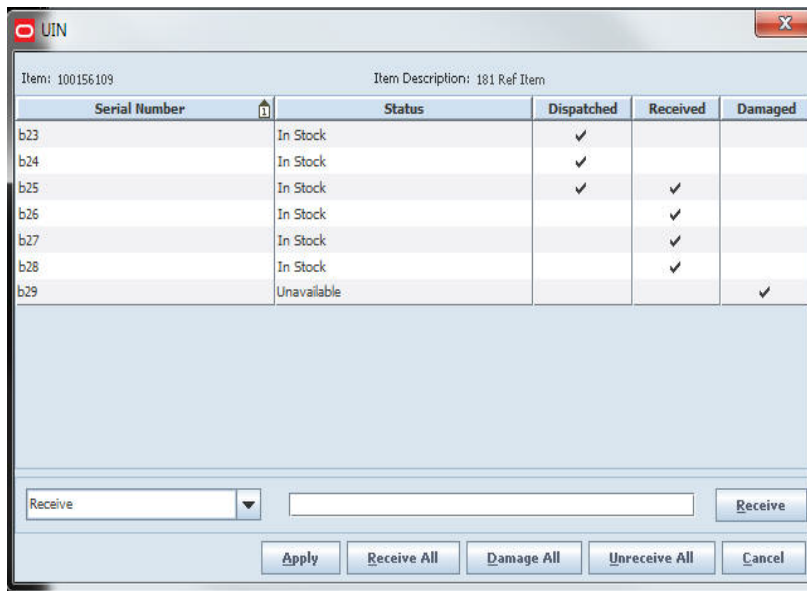
Figure 5–5 UIN Quantity Field Window



Note: A UIN Qty field appears in numerous SIM windows; this is just one example. When the UIN Qty field appears, entering, and updating UINs works in a similar manner throughout the SIM user interface.

When you double-click the UIN Qty field, the UIN window opens, in which you can enter the UINs that apply. In some cases, the UINs will already be listed if they have been identified by a third party system.

Figure 5–6 UIN Window



The UIN window contains the following fields:

Field	Description
Serial Number	Unique identification number of the item. For items that require Serial numbers, all serial numbers are listed, regardless of whether they were counted or recounted.
Status	Indicates the status of the item, such as Shipped to Store.
Dispatched	Indicates when the UIN has been moved to a Shipped to Store status by either a store to store transfer, or if included on an ASN.
Received	Indicates when UINs have been identified to receive in the system.
Damaged	Indicates when the UINs have been identified to received as damaged in the system.
Action	Drop down to indicate Receive, Un-Receive, Damaged.
Text Box	Used to type in the UIN the user wants to work with.

1. Select an action from the drop-down list:
 - **Receive** to mark a UIN to be received.
 - **Un-receive** to remove the received item.
 - **Damage** to mark the item as damaged.
2. Enter the **UIN number** in the text box.
3. Press **Enter**, or click the button at the end of the text box, to assign the action to the item. The action will be populated in the fields above.
4. Click **Apply** to save changes made on the UIN window, or:
 - Click **Receive All** to receive all items on the UIN window.
 - Click **Damage All** to mark all items as damaged on the UIN window.
 - Click **Un-Receive All** to mark all items on the UIN window as un-received.

Notes:

- A **UIN** window is used for updating UINs in numerous SIM functions. This is just one example.
 - The fields and field labels in the UIN window vary, depending on the function and on the different kinds of UINs configured in your SIM system.
-
-

Item Lookup by UIN

As you perform many SIM tasks, you can use UINs to search for items and containers. Both Item Lookup and Container Lookup provide a UIN field that you can use to enter a UIN value as a search parameter. The UIN is used as a method for searching for an item. It does not add the UIN to the transaction.

Figure 5-7 Item Lookup Window

The screenshot shows the 'Item Lookup' window with the following details:

- Search Type:** Item (selected), Supplier, Warehouse, Finisher, UDA, Inventory.
- Item:** [Empty field]
- UIN:** 5
- Item Descriptions:** [Empty field]
- Dept.:** -Select-
- Class:** -Select-
- Sub-Class:** -Select-
- *Search Limit:** 500
- Include Non-Ranged:**

Item	Item Description	Primary Supplier	Primary Supplier Na...	Dept.	Class	Sub-Class
100144207	04272011 test 1	1000000011	test	Detergents*	All Purpose*	Liquid*
100218907	BBQ Bricks	1000000011	test	Detergents*	All Purpose*	Liquid*
100252808	Item 100252808	111	05242011 Supplier Site ...	Detergents*	All Purpose*	Liquid*
100177107	PAV REG ITEM BA	22334455	PAV SUP SITE ST - BA	Detergents*	All Purpose*	Powder*
100156307	test	1000000011	test	Detergents*	All Purpose*	Liquid*
101320476	Test Item 101320476	2910	Local Supplier #2	Cigarettes,Tobacco*	Cigarettes*	Premium*
101320581	Test Item 101320581	3030	General Book Supplier ...	Cigarettes,Tobacco*	Cigarettes*	Economy*

Buttons: Search, Apply, Reset, Cancel

When using the Item Lookup method, the results will display on the [Item Lookup](#) screen allowing the user to select and Apply the item to the transaction. From the list, select the item you want to use and click **Apply**.

For other SIM tasks, you can enter a UIN instead of an item ID in any field that requires an item identifier (fields typically labeled Item). This capability applies to all functional areas of the SIM user interface in which item IDs are required.

Figure 5-8 Inventory Adjustment Detail Window

The screenshot shows the 'Store Inventory Management' window with the following details:

- Adjustment Number:** 1061
- Reference Adj. ID:** [Empty field]
- Status:** In Progress
- Template:** 201 - Inv adj reason security not all
- Multiplier:** 1
- Date:** 7/8/12
- User:** Sue
- Approval Date:** [Empty field]
- Approval User:** [Empty field]
- Comments:** [Empty field]
- Reason:** -Select-

Item	Item Description	Reason	Disposition	Sub-bucket	UOM	Pack Size	Inventory	Quantity	UIN Qty
100151995	elt do not use:Red:G	Stock Count In	+ Stock On Hand		Units	1		100	
100136070	Item1:Brown:Blueberr	Stock Count In	+ Stock On Hand		Units	1		100	
100136100	Item1:Brown:CherryS	Damaged - Out	- Stock On Hand		Units	1	177	1	
100136010	Item1:Black:Raspberr	Wastage	- Stock On Hand		Units	1	4978	1	

Client Information: orsadmin orsadmin | 1111 - Charlotte 11* | Inventory Adjustment Detail | Help | Jump

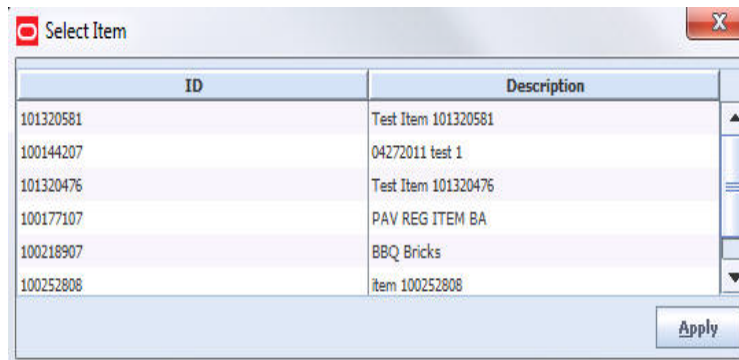
For example, if you are creating a new inventory adjustment, you can enter a UIN in the Item field in place of the item ID. This method requires you to type the UIN directly on the inventory adjustment screen instead of clicking the [Ellipsis](#) button.

When you leave the Item field (by pressing Tab or moving the pointer), SIM searches for the UIN you entered.

If a single item matches the UIN you entered, that item is selected and the necessary fields are filled in automatically.

If there are multiple items that have the UIN value you entered, the Select Item window opens.

Figure 5–9 Select Item Window



From the list, select the item you want to use and click **Apply**.

If the value you entered in the Item field does not match either a SIM item ID or a UIN, an error message informs you that it is an invalid value.

Note: In Item Lookup, if multiple items have the same UIN, all of the items found are listed in the [Item Lookup](#) window so that you can select the item to use. The Select Item window is not displayed.

SIM uses role-based security. Each individual SIM system user is assigned one or more roles, and specific permissions are assigned to each role. Permissions assigned to a role allow a user in that role to perform many different SIM tasks. For example, only certain roles have permission to perform tasks such as approving orders and stock counts or changing the SIM user interface. Roles are typically designed and assigned according to the job duties of people in an organization. SIM roles can be tailored as needed to fit different levels and areas of responsibility.

Role permissions control access to SIM menu options, forms (windows), and buttons and fields on those forms. You can access any of the SIM functions for which your assigned role has the necessary permissions. Depending on your role, certain buttons and menus may not even appear in the SIM user interface.

SIM roles and permissions are designed and assigned by a system user, probably a system administrator, whose role has the necessary permissions to create and modify SIM roles and assign permissions. The Security functions are used to configure roles and permissions. If your role does not have the necessary permissions, you cannot access the Security functions.

In addition to role maintenance, SIM also allows users and user/role assignments to be created and edited. You can change the roles assigned to any user to allow access to more or fewer SIM functions. Users can also be assigned to one or more stores.

The system administrator can also configure the requirements for user passwords to enforce more robust password security.

Maintaining users and user/role assignments in SIM depends on how SIM security is configured. For more information about configuring SIM security, particularly system options, see the *Oracle Retail Store Inventory Management Implementation Guide*.

The functions available on the Security menu are as follows:

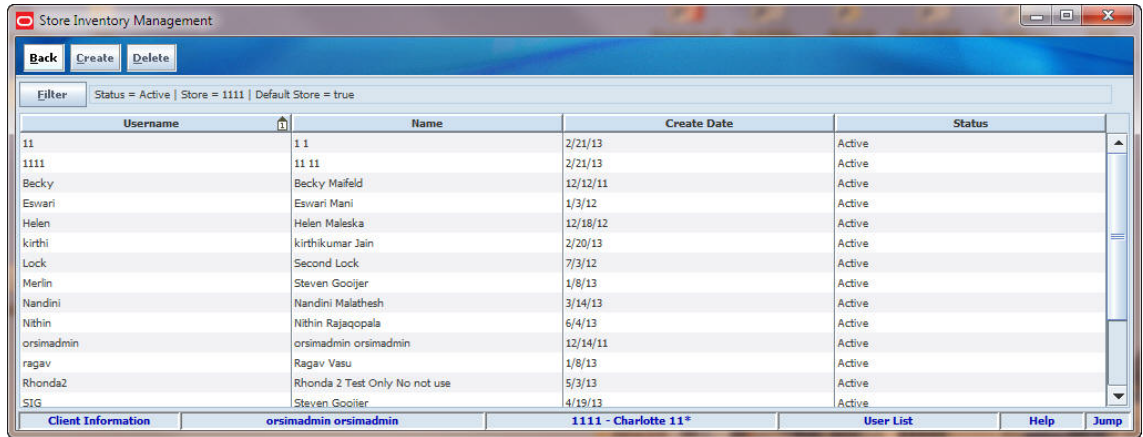
- [User Maintenance](#)
- [Mass Assign Stores](#)
- [Mass Assign Roles](#)
- [Role Maintenance](#)
- [Password Configuration](#)

User Maintenance

Use the User Maintenance functions to establish and update records for all SIM users.

Navigate: Main Menu > Admin > Security > User Maintenance. The User List window opens.

Figure 6–1 User List Window



The User List window displays the following information about SIM users:

Field	Description
Username	Unique name assigned to the user for login to SIM
Name	User’s first and last name
Create Date	The date the user record was created
Status	Active or Inactive

From the User List window, you can do the following:

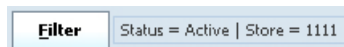
- [Filter the User List](#)
- [Create a New User](#)
- [Update a User](#)
- [Delete a User](#)

Click **Back** to return to the Security menu.

Filter the User List

At any time while the User List window is open, you can click **Filter** to change how the list is filtered.

Current filtering is displayed next to the Filter button on the User List window. If no filtering is displayed, all items are currently selected and listed.



To change how the list is filtered, follow these steps:

1. Click **Filter**. The User Filter window opens.

Figure 6–2 User Filter Window

2. If you want to reset all filtering criteria to default values, click **Reset**.
3. Enter or select filtering criteria as needed to select just the users you want to list. All criteria are optional. If you leave a field blank or select All, all values will be included in your filtering selection.

Username – Enter a character string that is contained in the Username of the user records you want.

First Name – Enter a character string that is contained in the First Name of the user records you want.

Last Name – Enter a character string that is contained in the Last Name of the user records you want.

Role – Select a role to list all users who are assigned that role.

Type – Select a user type to list all users of that type.

Status – Select a status to list all users in that status.

Group – Select a group to list all users in that group. Groups are based on security features: Server Ops User, MPS Ops User, Administrator User, Security Ops User, Batch User, and Integration User.

Create Date – Enter or select a date to list all users for whom records were created on that date.

Start Date – Enter or select a date to list all users whose start date is that date.

Store – Select a store to list all users for that store.

Default Store – If you selected a store, this field is enabled. If you want to list all users for the store, select **All**. If you want to list only those users for whom the selected store is their default store, select **Yes**. If you want to list those users for whom the selected store is not their default store, select **No**.

Comments – If you want to search the Comments field in user records, enter a character string contained in the Comments field of the user records you want to list.

4. Click **Apply**. Results that match your search criteria are displayed in the User List window.

Create a New User

To add a new user to SIM, follow these steps:

1. Click **Create**. The User Detail window opens.

Figure 6–3 User Detail Window

2. Enter values for the fields. The following fields are required:

First Name – The user’s first name.

Last Name – The user’s last name.

Username – A unique name by which the user will be known when logged in to SIM. A suggested user name is provided, based on the user’s last and first names; you can change this value to any other you prefer.

Locale – Select the locale for language and currency.

User Type – Select one of these types:

- Store User – This status applies to most users. A store user can have access to multiple stores, but does not require access to all SIM stores.
- Superuser – A superuser has access to all stores in SIM.
- Temporary User – This status can be used to set up new users temporarily until their accounts are established in a corporate security system. Temporary users are known only to SIM, and each temporary user must have an End Date value assigned.

Status – Select a status of Active or Inactive.

The other fields are optional and can be used as preferred in your organization.

3. To complete setup of the new user, these additional steps are required:
 - a. Assign an initial password to the user. See "[Assign a User Password](#)."
 - b. Assign stores to the user. See "[Assign Stores to a User](#)."
 - c. Assign roles to the user. See "[Assign Roles to a User](#)."
 - d. Assign groups to the user. See "[Assign Groups to a User](#)."

You can copy store and role assignments from an existing user. See "[Copy Assignments from Another User](#)."

4. Click **Save** to save the user record and return to the User List window.

Assign a User Password

To assign an initial user password, follow these steps:

1. Click **Assign Password**. The Assign Password window opens.

Figure 6–4 Assign Password Window



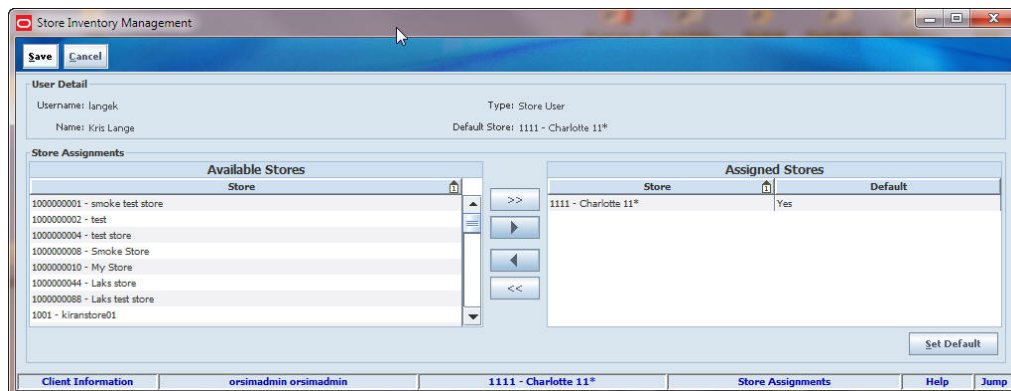
2. Generate a password or enter a password manually:
 - To generate a password value automatically, click **Auto Generate**. Both fields are completed with a random string value generated by SIM.
 - To assign a specific password, enter the password value in both the **Password** and **Retype Password** fields.
3. Click **Apply** to assign the password and return to the User Detail window. The Password Assigned check box indicates that you have assigned a password to this user.

Assign Stores to a User

To assign stores to a user, follow these steps:

1. Click **Assign Stores**. The Store Assignments window opens.

Figure 6–5 Store Assignments Window



2. To assign stores, follow these steps:
 - a. In the **Available Stores** list, select the stores you want to assign to the user.
 - b. Click the right-arrow button to move the selected stores to the Assigned Stores list.

To assign all stores, click the double-right-arrow button.

Note: The stores that you can assign to a user are limited to those stores to which you have access. Other stores are not listed.

3. To remove store assignments, follow these steps:
 - a. In the **Assigned Stores** list, select the stores you want to remove.
 - b. Click the left-arrow button to move the selected stores to the Available Stores list.

To remove all stores, click the double-left-arrow button.

4. To assign the user's default store, follow these steps:
 - a. In the **Assigned Stores** list, select the user's default store at login.
 - b. Click **Set Default**. The Default column for the selected store is marked "Yes."

Note: You must select at least one default store.

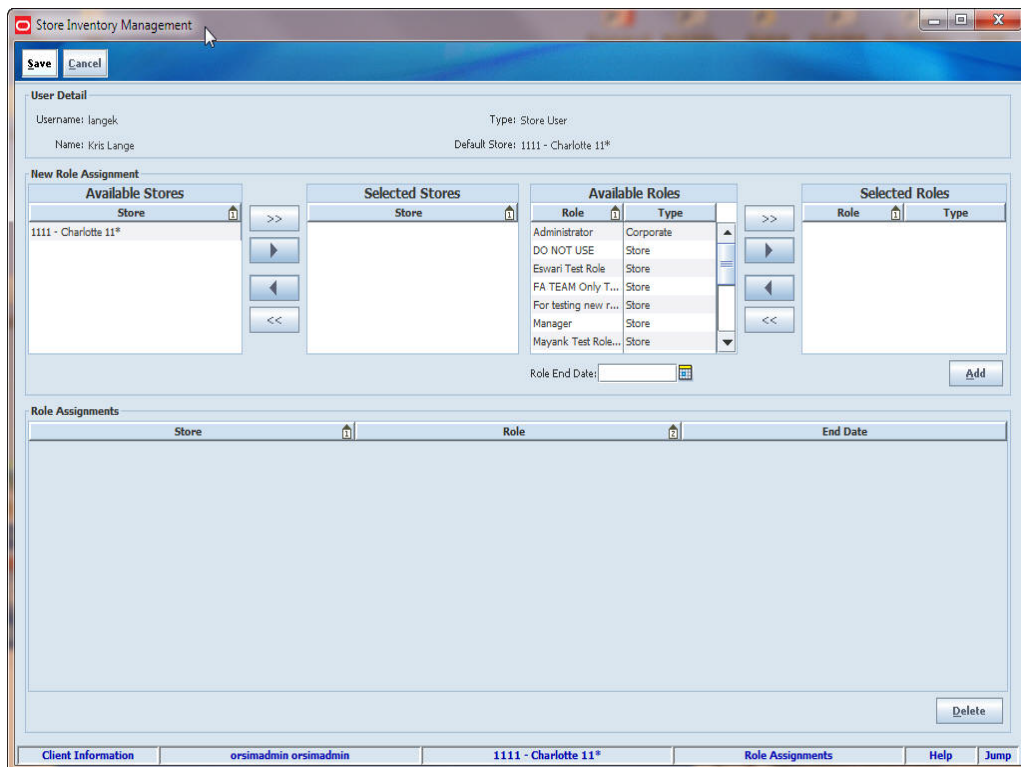
5. Click **Save** to save your changes and return to the User List window.

Assign Roles to a User

To assign roles to a user, follow these steps:

1. Click **Assign Roles**. The Role Assignments window opens.

Figure 6–6 Role Assignments Window



2. In the **Available Stores** list, select one or more stores to which the selected roles will apply.
3. Click the right-arrow button to move the stores to the Selected Stores list. (To select all stores at once, click the double-right-arrow button.)
To remove stores, select the assigned stores and click the left-arrow button.
4. In the **Available Roles** list, select one or more roles that you want to assign to the user.
5. Click the right-arrow button to move the roles to the Selected Roles list. (To select all roles at once, click the double-right-arrow button.)
To remove roles, select the assigned roles and click the left-arrow button.
6. Click **Add**. The Role Assignments window lists the stores and related roles assigned to the user.
To remove a store/role combination, select the role assignment and click **Delete**.
7. Click **Save** to save your changes and return to the User List window.

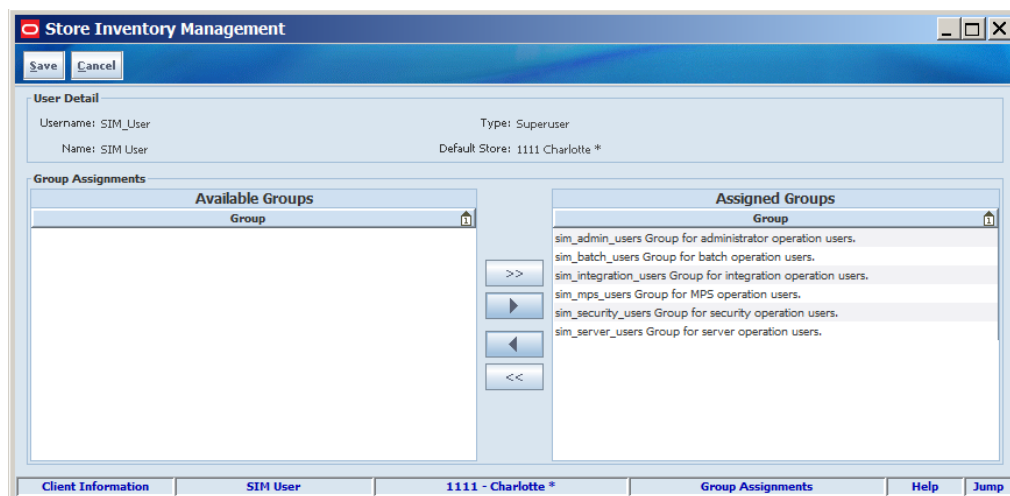
Assign Groups to a User

Note: Before this screen is available to a user, the Data Permissions for the security groups must be assigned to the appropriate user roles.

To assign groups to a user, follow these steps:

1. Click **Assign Groups**. The Group Assignments window opens.

Figure 6–7 Group Assignments Window



2. In the Available Groups list, select one or more groups to assign to the user.
3. Click the right-arrow button to move the groups to the Assigned Groups list. (To select all groups at once, click the double-right-arrow button.)
To remove groups, select the assigned group and click the left-arrow button.
4. Click **Save** to save your changes and return to the User List window.

Copy Assignments from Another User

Note: The Copy Assignments button is only available when you are setting up a new user. You can assign only store/role combinations that you have yourself.

It can be easier to copy the store and role assignments of a user that is already set up. If you copy store and role assignments, you can still make additional changes to the assignments for the new user you are setting up.

To copy the store and role assignments from another user, follow these steps:

1. Click **Copy Assignments**. The User Lookup window opens.

Figure 6–8 User Lookup Window

2. Enter or select values for the User Lookup fields to specify the existing users that you want to find.
3. Click **Search**. The users that match your search criteria are listed.
4. Select the user whose assignments you want to copy for the new user you are setting up.
5. Click **Apply**. You return to the User Detail window.
6. To view and change the new user's store and role assignments as needed, use the Assign Stores, Assign Roles, and Assign Groups functions. See "[Assign Stores to a User](#)," "[Assign Roles to a User](#)," and "[Assign Groups to a User](#)."
7. Click **Save** to save the new user and return to the User List window. The new user has been added to the list of users, with the stores and privileges of the selected user.

Update a User

You can update a user's personal information (such as name, supervisor, employee number) or assignments at any time.

Note: You can only update records for internal users (that is, users who were created in SIM and not an external security system).

To update a user's information or assignments, follow these steps:

1. If you want to filter the users listed, click **Filter**. See "[Filter the User List](#)."
2. Double-click on the user whose information you want to change. The User Detail window opens.
3. Make any updates required:
 - Change or add values as needed in fields of the User Detail window. See "[Create a New User](#)" for information about field values.
 - To assign a new password, click **Assign Password**. The Assign Password window opens. See "[Assign a User Password](#)."
 - To update store assignments, click **Assign Stores**. The Store Assignments window opens. See "[Assign Stores to a User](#)."
 - To update role assignments, click **Assign Roles**. The Role Assignments window opens. See "[Assign Roles to a User](#)."
 - To update group assignments, click **Assign Groups**. The Group Assignments window opens. See "[Assign Groups to a User](#)."
4. Click **Save** to save any changes and return to the User List window.

Delete a User

Delete the records of users that are no longer needed.

Note: You cannot delete users who were set up in an external security system. You can only delete users who were set up in SIM.

To delete one or more users, follow these steps:

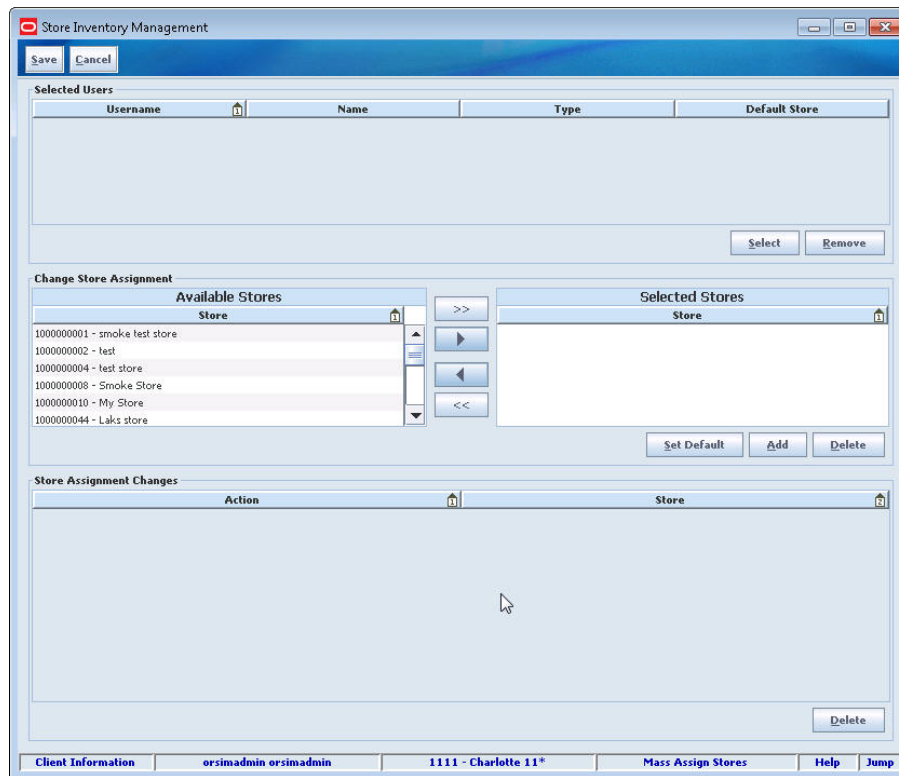
1. If you want to filter the users listed, click **Filter**. See "[Filter the User List](#)."
2. Select the users you want to delete.
3. Click **Delete**. A message is displayed to verify that you want to delete the users you have selected.
4. Click **Yes**. The selected users are deleted and you return to the User List window.

Mass Assign Stores

Use the Mass Assign Stores functions to assign one or more stores to one or more SIM users.

Navigate: Main Menu > Admin > Security > Mass Assign Stores. The Mass Assign Stores window opens.

Figure 6–9 Mass Assign Stores Window



To assign stores to users, follow these steps:

1. To add users to the list, follow these steps:
 - a. Click **Select**. The User Lookup window opens.
 - b. Enter or select values for the User Lookup fields to specify the existing users that you want to find.
 - c. Click **Apply**. The users that match your search criteria are listed.
 - d. Select one or more users to whom you want to assign stores. You return to the Mass Assign Stores window.

To remove users from the list, select the users and click **Remove**.

2. To assign stores, follow these steps:
 - a. In the **Available Stores** list, select the stores you want to assign to all the selected users.
 - b. Click the right-arrow button to move the selected stores to the Assigned Stores list.

To assign all stores, click the double-right-arrow button.

Note: The stores that you can assign to a user are limited to those stores to which you have access. Other stores are not listed.

3. To assign a default store for all the selected users, follow these steps:
 - a. In the **Assigned Stores** list, select the default store.

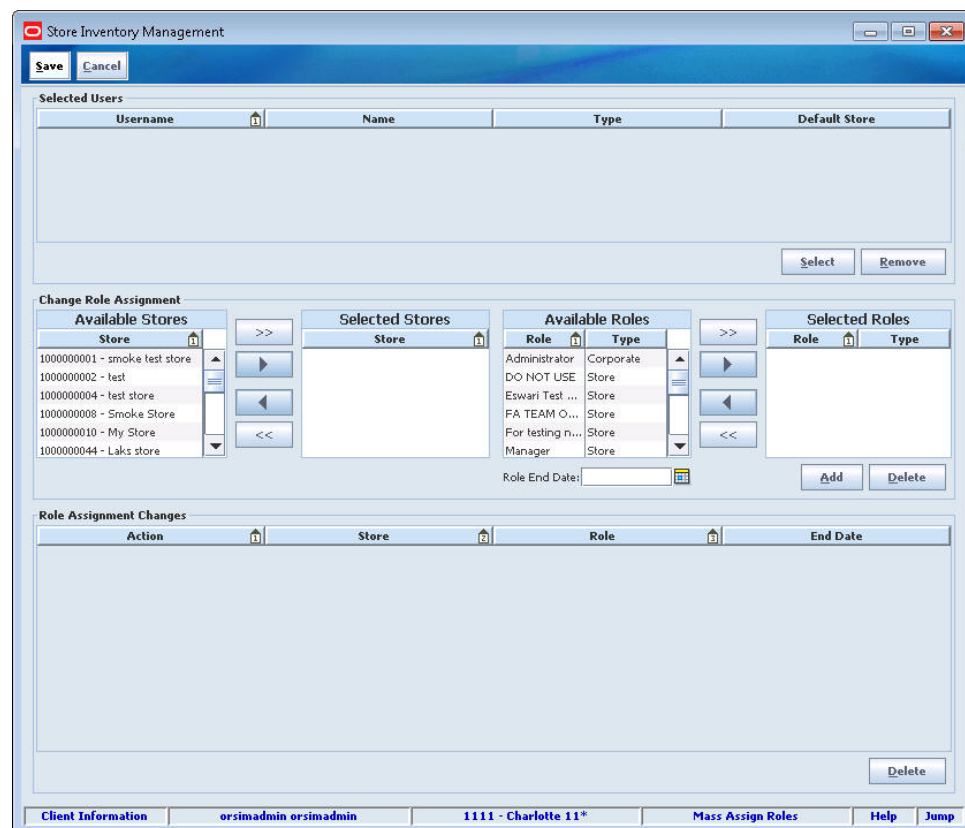
- b. Click **Set Default**.
4. To add the store assignments for the selected users, click **Add**. The store assignments are listed in the Store Assignment Changes list.
To remove store assignments from the Store Assignment Changes list, select the stores and click **Delete**.
5. Click **Save** to save your changes and return to the Security menu.

Mass Assign Roles

Use the Mass Assign Stores functions to assign one or more roles to one or more SIM users.

Navigate: Main Menu > Admin > Security > Mass Assign Stores. The Mass Assign Roles window opens.

Figure 6–10 Mass Assign Roles Window



To assign roles to users, follow these steps:

1. To add users to the list, follow these steps:
 - a. Click **Select**. The User Lookup window opens.
 - b. Enter or select values for the User Lookup fields to specify the existing users that you want to find.
 - c. Click **Search**. The users that match your search criteria are listed.
 - d. Select one or more users to whom you want to assign roles.

- e. Click **Apply**. You return to the Mass Assign Roles window.
To remove users from the list, select the users and click **Remove**.
2. To select the stores for which the assigned roles will apply, follow these steps:
 - a. In the **Available Stores** list, select the stores.
 - b. Click the right-arrow button to move the selected stores to the Selected Stores list.

To select all stores, click the double-right-arrow button.

To remove stores from the Selected Stores list, select the stores and click the left-arrow button.
3. To select the roles that the users will have for the selected stores, follow these steps:
 - a. In the **Available Roles** list, select the roles you want to assign.
 - b. Click the right-arrow button to move the selected roles to the Selected Roles list.

To select all roles, click the double-right-arrow button.

To remove roles from the Selected Roles list, select the roles and click the left-arrow button.
4. In the **Role End Date** field, select or enter the end date for the selected roles for the selected users.
5. Click **Add**. The role assignments are listed in the Role Assignment Changes list.

To remove role assignments from the Role Assignment Changes list, select the roles and click **Delete**.
6. Click **Save** to save your changes and return to the Security menu.

Role Maintenance

Use the Role Maintenance functions to create and modify roles and assign permissions to roles.

Navigate: Main Menu > Admin > Security > Role Maintenance. The Role List window opens.

Figure 6–11 Role List Window

Role Name	Description	Role Type
ADMINISTRATOR	Administrator	Corporate
Eswari Test Role	Eswari Test Role	Store
FA Team Role	FA TEAM Only Testing Role	Store
MANAGER	Manager	Store
Mayank Test Role	Mayank Test Role Only	Store
Nithin ONLY	Nithin Testing Only	Store
Nithin Role	Nithin Role	Store
One Store Test	Sue TEST ONLY DO NOT USE	Store
POS Testing	POS group Only	Store
Ragav Testing Role	For testing new roles	Store
Rhonda Role	Rhonda Role QA Testing	Store
Sue 2	DO NOT USE	Store
Sue Role Only	Sue Role QA testing	Store
test	test	Store
Varsha Role ONLY	Varsha QA	Store

The Role List window displays the following information about SIM roles:

Field	Description
Role Name	Name assigned to the role. This name corresponds to the role assigned in the external security system.
Description	Brief description of the role.
Role Type	Store or Corporate, used for filtering in SIM.

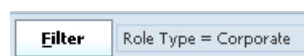
From the Role List window, you can do the following:

- [Filter the User List](#)
- [Create a New Role](#)
- [Edit or View an Existing Role](#)
- [Delete a Role](#)

From the Role List window, click **Back** to return to the Security menu.

Filter the Role List

Whenever the Role List window is displayed, you can filter the list to limit the roles listed. If the list is currently filtered, the filtering is shown next to the Filter button.



To filter the list of roles or to change the current filtering, follow these steps:

1. In the Role List window, click **Filter**. The Role Filter window opens.

Figure 6–12 Role Filter Window

2. Enter or select search values as needed to specify the roles that you want to list. All values are optional. If you leave a field blank or do not make a selection, all values are included in the search.

Role Name – Enter all or part of the role name. All role names that contain the value you enter will be returned from the search.

Description – Enter all or part of the role description. All role descriptions that contain the value you enter will be returned from the search.

Role Type – Select Corporate or Store.

Topic – Select a topic to return all roles that have permissions related to that topic.

Permission – If you select a topic, you can also specify a specific permission related to that topic. Only roles with that specific permission will be returned from the search.

3. Click **Apply**. You return to the Role List window, where your filter has been applied.

Create a New Role

To create a new SIM user role, you must assign to that role all the permissions required by that role to perform the role's assigned duties. There are two levels of permissions:

- Permissions for functional areas of the SIM application
- Data permissions, for access to data that the user can update

Also see the *Oracle Retail Store Inventory Management Implementation Guide, Volume 1–Configuration* for information about how to coordinate SIM user roles with roles defined in an external security system.

Navigate: Main Menu > Admin > Security > Role Maintenance. The Role List window opens.

To create a new role, follow these steps:

1. Click **Create**. The Role Detail window opens.

Figure 6–13 Role Detail Window – Create Role

The screenshot shows the 'Store Inventory Management' application window. At the top, there are buttons for 'Save', 'Data Permissions', and 'Cancel'. Below these are input fields for '*Role Name:', '*Role Description:', and '*Role Type:' (a dropdown menu). There are also checkboxes for 'End Date Required:' and 'Contains Data Permissions:'. Below these are dropdown menus for 'Topic:' and 'Device:'. The main area is split into two panes: 'Available Permissions' on the left and 'Assigned Permissions' on the right. The 'Available Permissions' pane contains a table with columns 'Permission', 'Topic', and 'Device'. The 'Assigned Permissions' pane is currently empty. Between the panes are navigation buttons: '>>', '>', '<', and '<<'. At the bottom, there is a status bar with 'Client Information', 'orsimadmin orsimadmin', '1111 - Charlotte 11*', 'Role Detail', 'Help', and 'Jump'.

2. Complete the following fields to identify the new role:

Role Name – Enter the system name for the role. This name is used as a system key to identify the role and cannot be changed after you have created a new role.

Role Description – Enter the description of the role.

Role Type – Select Corporate or Store. See the *Oracle Retail Store Inventory Management Implementation Guide* for more information about role types.

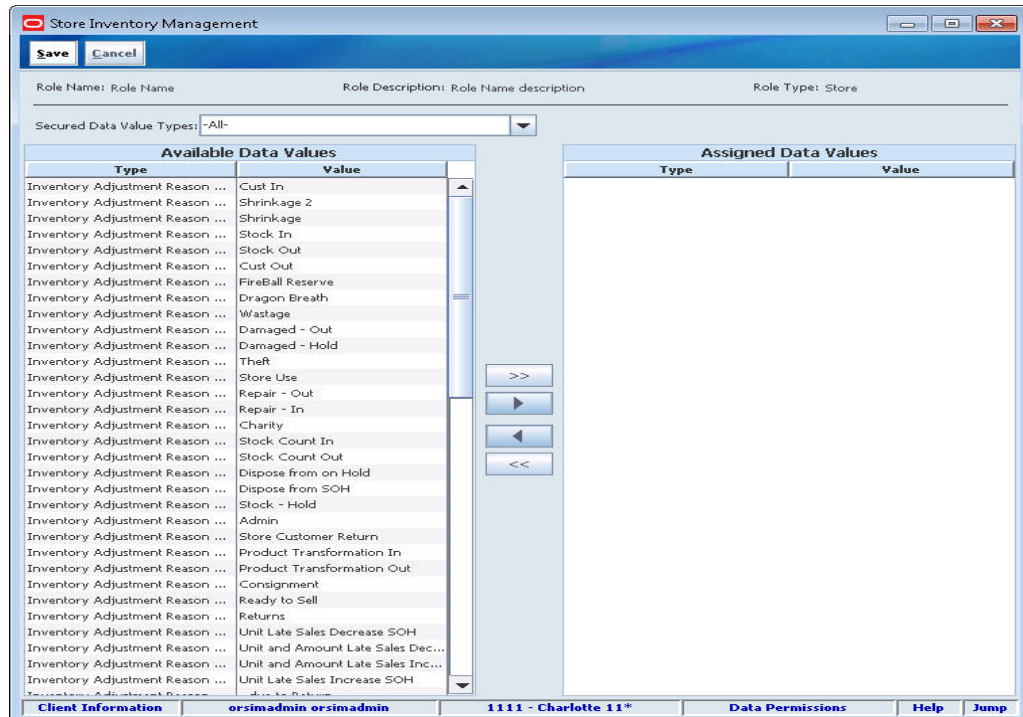
End Date Required – Select this check box if this role requires an end date. When the role is assigned to a user, an end date will be required.

3. By default, all possible permissions for SIM functions on the PC and handheld are listed in the Available Permissions list. You can use the Topic and Device fields to limit the permissions displayed at one time. Filter the Available Permissions list as follows:
 - a. In the **Topic** field, select a topical area for which you want to assign permissions (for example, Admin, Item Requests, Returns). Only the permissions available for that topic will be listed.
 - b. In the **Device** field, select Handheld or PC to list only the permissions available for that type of device.
4. Assign functional permissions to the role by moving permissions from the Available Permissions list to the Assigned Permissions list, as follows:
 - a. Select one or more permissions from the Available Permissions list.
 - b. Click the right-arrow button to assign the selected permissions to the role.

Note: To assign all permissions listed to the role, click the double-right-arrow button.

5. Repeat Steps 3 and 4 as needed to assign functional permissions for different topic areas.
6. Assign data permissions to the new role as follows:
 - a. Click **Data Permissions**. The Data Permissions window opens.

Figure 6–14 Data Permissions Window



By default, all secured SIM data permissions are listed in the Available Data Values list. You can use the Secured Data Value Types field to limit the data permissions displayed at one time.

- b. In the **Secured Data Value Types** field, select a data value type to limit the data values listed in the Available Data Values list (for example, Inventory Adjustment Reason or Return Source).
- c. Select one or more data values from the **Available Data Values** list.
- d. Click the right-arrow button to assign the selected data values to the role.

Note: To assign all data values listed to the role, click the double-right-arrow button.

- e. Repeat Steps b through d to assign all data values needed by the role.
 - f. Click **Save** to return to the Role Detail window.
7. Click **Save** to save the new role and return to the Role List window.

Edit or View an Existing Role

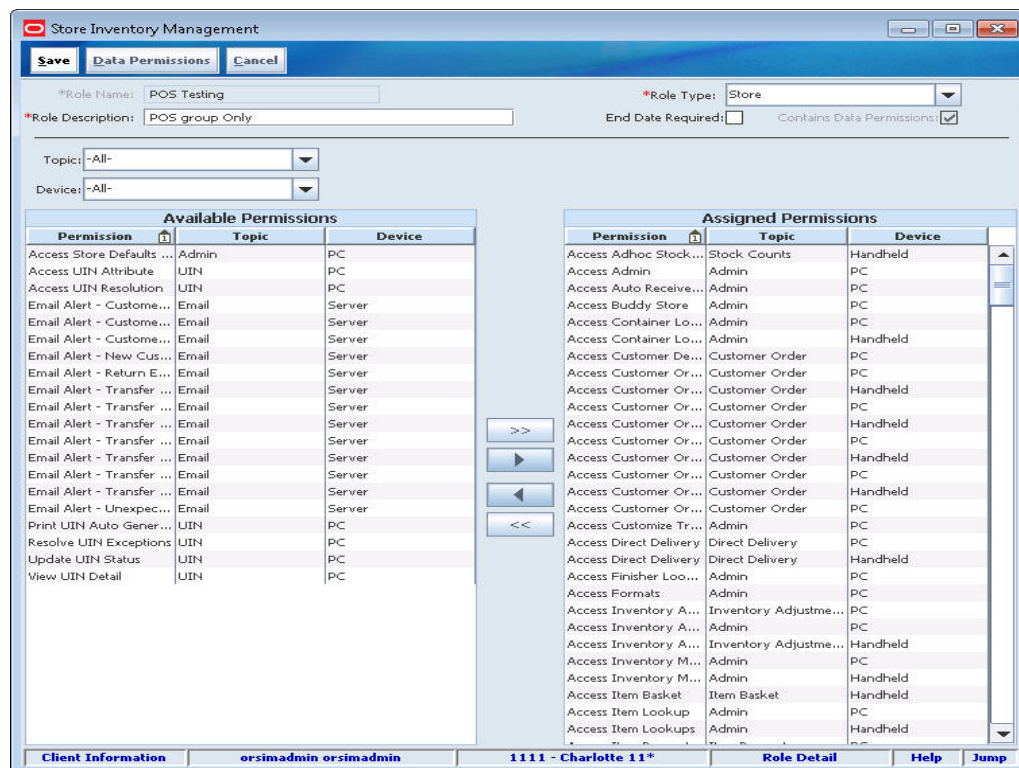
You can view details about an existing role and change role permissions as needed.

Navigate: Main Menu > Admin > Security > Role Maintenance. The Role List window opens.

To view or edit an existing role, follow these steps:

1. If you want to filter the roles listed, click **Filter**. See “[Filter the Role List](#).”
2. Double-click on the role you want to edit or view. The Role Detail window opens.

Figure 6–15 Role Detail Window – Edit Role



3. Assign or remove permissions for the role. See “[Create a New Role](#)” for details about assigning permissions.

Note: To remove permissions, click the left-arrow buttons. To remove all permissions, click the double-left-arrow buttons.

4. Click **Save** to save the changes to the role and return to the Role List window.

Delete a Role

Delete roles that are no longer needed and are not being used.

Caution: Deleting a role immediately prevents all users of that role from using the features assigned to that role in SIM. If you want to view the details of a particular role before you decide to delete it, see [“Edit or View an Existing Role.”](#)

Navigate: Main Menu > Admin > Security > Role Maintenance. The Role List window opens.

To delete one or more roles, follow these steps:

1. If you want to filter the roles listed, click **Filter**. See [“Filter the Role List.”](#)
2. Select the roles you want to delete.
3. Click **Delete**. A message is displayed to verify that you are sure that you want to delete the roles you have selected.
4. Click **Yes**. The selected roles are deleted and you return to the Role List window.

Password Configuration

Note: If SIM is configured to use passwords from an external security system, this function is not available.

Use the Password Configuration function to set requirements for SIM user passwords. You can set requirements such as minimum and maximum length, how often passwords must be changed, and the kinds of characters that are required in password values. The rules you set are applied when users change their passwords.

You can change the password rules whenever it is necessary. Default values are set when SIM is installed.

Navigate: Main Menu > Admin > Security > Password Configuration. The Password Configuration window opens.

Figure 6–16 Password Configuration Window

To change requirements for passwords, follow these steps:

1. For the check boxes under **Passwords Must Contain**, select the check box to specify that every password *must* contain at least one character of the type specified:

Numeric (selected by default)

Special Character (not selected by default)

Alpha-Numeric Character (selected by default)

Capital Letter (selected by default)

If you deselect (uncheck) any check box, characters of that type are allowed but not required in SIM password values.

2. Set the values of all of the following:

Minimum Password Length – The minimum required length of a password. The value can be an integer from 1 to 20 (default 8).

Maximum Password Length – The maximum allowed length of a password. The value can be an integer from 2 to 20 (default 8). This value must be equal to or greater than the Minimum Password Length value.

Days Until Password Expires – The maximum number of days that a password remains valid. If a user logs in to SIM and the user's password has not been changed for this number of days (or more), the user is prompted to enter a new password. This value can be an integer from 0 to 999 (default 90). A value of 0 means that passwords never expire.

Days Before Password Expires to Notify – The number of days before expiration when a user is first notified about upcoming password expiration. When a user

logs in to SIM and the user's password will expire in this number of days (or less), the user is notified about the number of days remaining before a new password is required. This value can be an integer from 0 to 999 (default 14). A value of 0 means that users are not notified about upcoming password expiration.

Number of Previous Passwords to Disallow – The number of most recent previous passwords for a user that cannot be reused when a password change is entered. This value can be an integer from 0 to 999 (default 5).

Special Characters – A list of the special characters that are allowed in user passwords. Enter all special characters allowed, separated by single spaces between the characters. If the check box **Special Character** is selected (meaning that a special character is required in every password), this field must contain at least one special character.

Change Initial Password – If this check box is selected (default), a new user is required to change passwords the first time that the new user logs in to SIM. If this check box is not selected, the new user can continue to use the password that was assigned when the user was created in SIM.

Email User New Password Assignments – If this check box is selected, SIM is allowed to send an e-mail containing the user's password to each new user, at the time that the new user is created in SIM. If this check box is not selected, SIM does not e-mail passwords to new users.

3. Click **Save** to save your changes and return to the Security menu.

Technical Maintenance

Technical maintenance tasks are those that control various aspects of SIM configuration and performance. Tasks range from tuning performance of polling timers to modifying the appearance and content of the SIM application.

Note: Only a system administrator or other user with the necessary security privileges can access the Technical Maintenance functions.

The Technical Maintenance functions are as follows:

- [Configure the User Interface](#)
- [Polling Timers](#)
- [MPS Staged Messages](#)

Configure the User Interface

The UI Configuration button gives you access to functions you can use to modify the appearance of the SIM user interface. You can also modify and add translated strings to the interface.

Modify the Application Appearance (Customize Themes)

You can configure the SIM user interface to customize its appearance and wording. You can modify existing themes or create new ones. Each theme can use a selected “look and feel” (general style) that you select, along with fonts and colors that you specify. You can substitute your own icons, such as your company icon, to replace some of those supplied with SIM. You can also modify translations and wording used in the user interface.

To modify the appearance and behavior of the user interface, you may want to experiment with different settings for look and feel, as well as different fonts, colors, and icons. There is no limit to the number of times you can make changes to a theme; however, new changes may not appear until the user restarts SIM.

You can activate your new or modified themes to make them available to all SIM users. You can also deactivate themes that you do not want to use.

To modify the application appearance, the following functions are available:

- [Create a Theme](#)
- [Customize Interface Fonts](#)
- [Customize Interface Colors](#)

- [Customize Interface Icons](#)
- [Activate or Deactivate a Theme](#)

Modify or Add Translated Strings (Customize Translations)

You can modify messages in the translation database, to substitute or add wording that you prefer to translated message strings. You can also create new translated strings that can be accessed by custom code using a key (name) that you specify. Each translation record consists of the following:

- A unique key (name) in English-language characters
- A translated message
- Optional comments

To modify or add translated strings, the following functions are available:

- [Modify Translations](#)
- [Create New Translations](#)

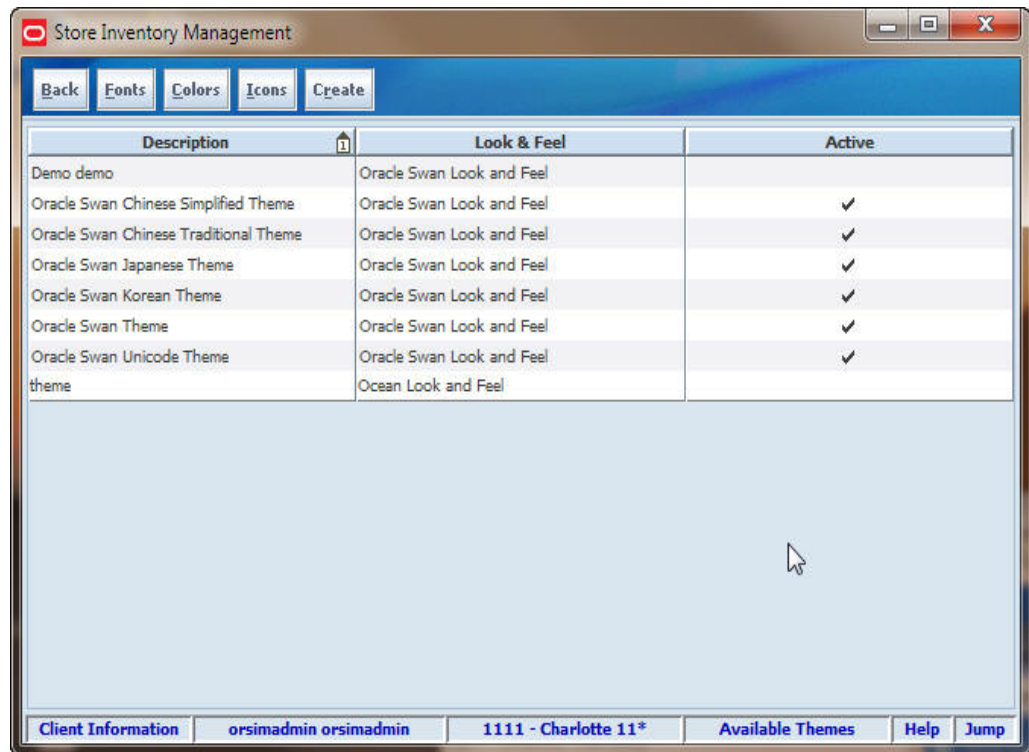
Note: The currency symbol display depends on the country associated to the location.

Adding another non-supported language requires the creation of a new language in the database. For more information, see the applicable Software Localization Tool Kit for SIM on My Oracle Support.

Create a Theme

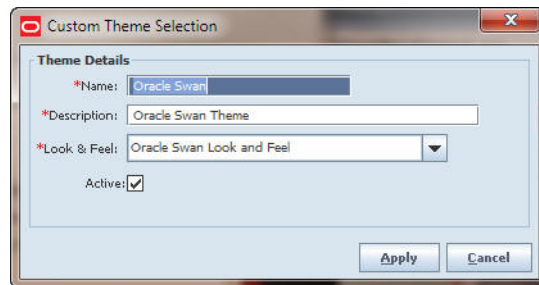
Use this procedure to create a new theme that you can customize to change the appearance of the SIM application.

Navigate: Main Menu > Admin > Technical Maintenance > UI Configuration > Customize Themes. The Available Themes window opens.

Figure 7-1 Available Themes Window

To create a new theme, follow these steps:

1. Click **Create**. The Custom Theme Selection window opens.

Figure 7-2 Custom Theme Selection Window

2. Enter a unique name for the new theme in the **Name** field. The name must be a name that is not currently used for a theme. A value is required in this field, and it can be up to 40 characters in length.
3. Enter a description of the theme in the **Description** field. A value is required in this field, and it can be up to 750 characters in length.
4. From the **Look & Feel** drop-down list, select one of the available values.
5. Click **Apply** to create the theme and close the Custom Theme Selection window.
6. Click **Back** to return to the UI Config menu.

After you have created the theme, you can modify the theme as you want to change colors, fonts, icons, and the look and feel of the theme. You can do the following:

- [Customize Interface Fonts](#)

- [Customize Interface Colors](#)
- [Customize Interface Icons](#)

When you are ready to make the theme available to SIM users, activate the theme. See [“Activate or Deactivate a Theme.”](#)

Customize Interface Fonts

To customize the fonts used in the interface, you can do any of the following:

- [Change Fonts](#)
- [Reset Fonts](#)
- [Apply a Universal Font Setting](#)

Change Fonts

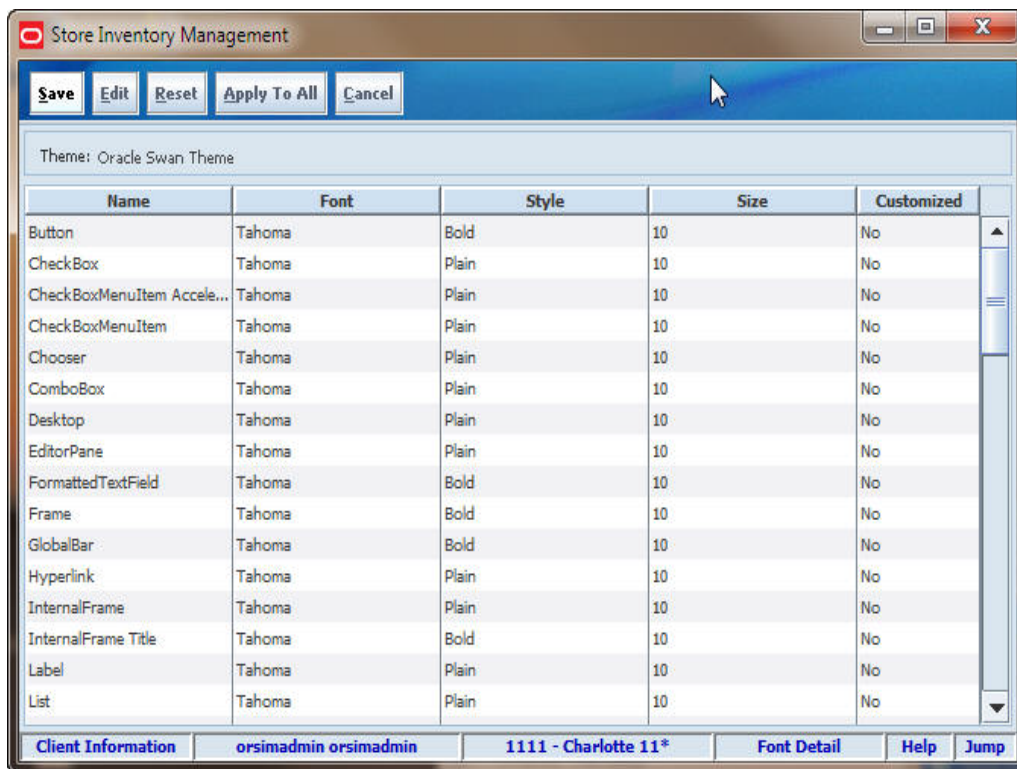
Use the following procedure to set the font for one application widget (interface element), or for a selected set of widgets. To apply the same font family to all SIM application widgets, see [“Apply a Universal Font Setting.”](#)

Navigate: Main Menu > Admin > Technical Maintenance > UI Configuration > Customize Themes. The Available Themes window opens.

To change fonts for one or more application widgets, follow these steps:

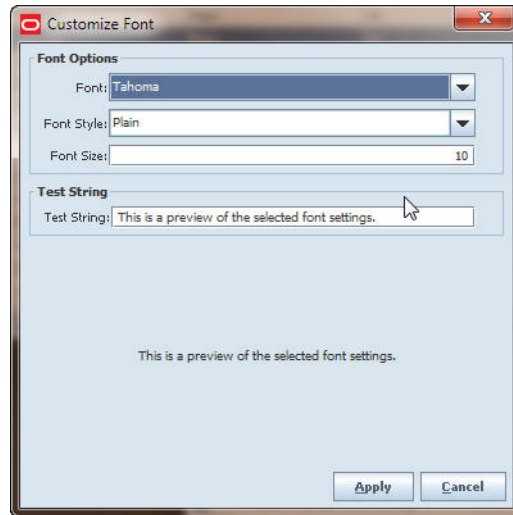
1. Click on the theme that you want to modify.
2. Click **Fonts**. The Font Detail window opens. The Font Detail window lists all of the SIM application widgets (interface elements) that have a font that you can change.

Figure 7-3 Font Detail Window



3. Select one or more widgets (rows) from the list. (If you select multiple rows, select widgets that you want to use the same font.)
4. Click **Edit**. The Customize Font window opens.

Figure 7-4 Customize Font Window



5. From the **Font** drop-down list, select the font (font family) that you want to use for the selected widgets. The default font is Tahoma.

Note: The fonts available are those that are installed on the PC that you are currently using. Be sure to select a font that other SIM users will also have installed on their own PCs.

6. From the **Font Style** drop-down list, select the style of the font (Bold, Italic, Italic-Bold, or Plain). The default is Plain.
7. In the **Font Size** field, enter the integer value of the size of the characters in points. Values that include fractions (such as .5) are not allowed. The default size is 10.

Note: A font size that is too large can cause incorrect display of labels and other text in the widgets for which you are setting the font size. If you increase the font size from the default size, be sure to test and verify that text is still displayed correctly.

8. Click **Apply** to save your changes and close the Customize Font window.
9. When you are finished changing fonts, click **Done** to return to the Available Themes window.
10. Click **Save** to return to the UI Config menu.

Reset Fonts

Note: Resetting fonts restores default font settings when SIM was installed. Any changes you have made to fonts for the selected widgets will be lost.

To reset the user interface fonts, follow these steps:

1. Click on the theme that you want to modify.
2. Click **Fonts**. The Font Detail window opens.
3. From the list, select all of the widgets (rows) that you want to reset to their original fonts.
4. Click **Reset**.
5. When you are finished, click **Save** to return to the Available Themes window.
6. Click **Back** to return to the UI Config menu.

Apply a Universal Font Setting

Use this procedure if you want to apply a single font (font family) to all SIM application widgets (for example, if you want to use Arial font throughout the SIM application). To set the font for a single widget or a group, see "[Change Fonts](#)."

Navigate: Main Menu > Admin > UI Configuration > Customize Themes. The Available Themes window opens.

To apply a universal font setting, follow these steps:

1. Click on the theme that you want to modify.
2. Click **Fonts**. The Font Detail window opens. The Font Detail window lists all of the SIM application widgets (interface elements) that have a font that you can change.
3. From the list, select one widget (row) that uses the font that you want to apply to this theme, to be used throughout the SIM user interface.

Note: The same font family (for example, Arial) will be applied to all widgets; however, the font size and style of the selected widget (for example, 12-point Bold) will not be applied. Applying the same font size and style throughout the application could cause many display problems.

4. Click **Apply to All**.
5. Click **Save** to return to the Available Themes window.
6. Click **Back** to return to the UI Config menu.

Customize Interface Colors

To customize the colors of the user interface, you can do the following:

- [Change Colors](#)
- [Reset Colors](#)

Change Colors

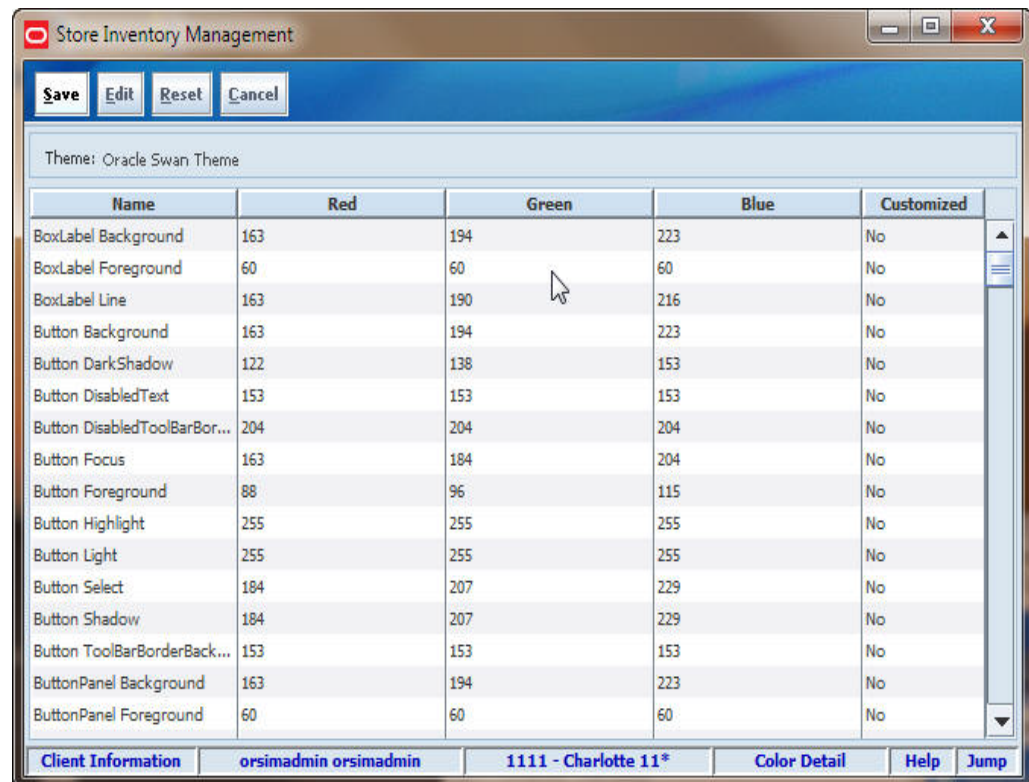
Use this procedure to apply color changes to one or more application widgets (interface elements).

Navigate: Main Menu > Admin > Technical Maintenance > UI Configuration > Customize Themes. The Available Themes window opens.

To change colors, follow these steps:

1. Click on the theme that you want to modify.
2. Click **Colors**. The Color Detail window opens. The Color Detail window lists all of the SIM application widgets that have a color property that you can change.

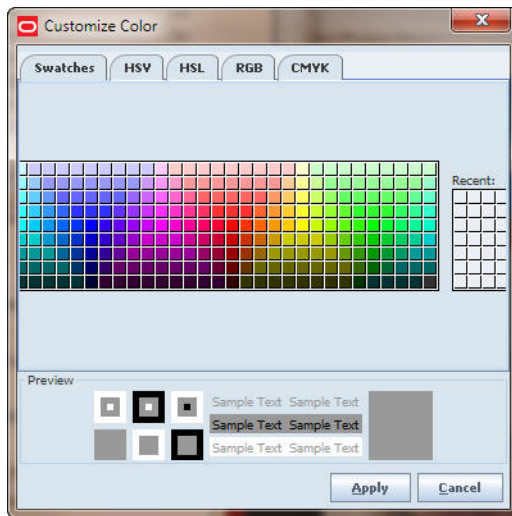
Figure 7-5 Color Detail Window



3. Select one or more widgets (rows) from the list. (If you select multiple rows, select widgets that you want to set to the same color.)
4. Click **Edit**. The Customize Color window opens.
5. Use any of the three tabs of the Customize Color window to select the color and view the settings for the color you have selected.

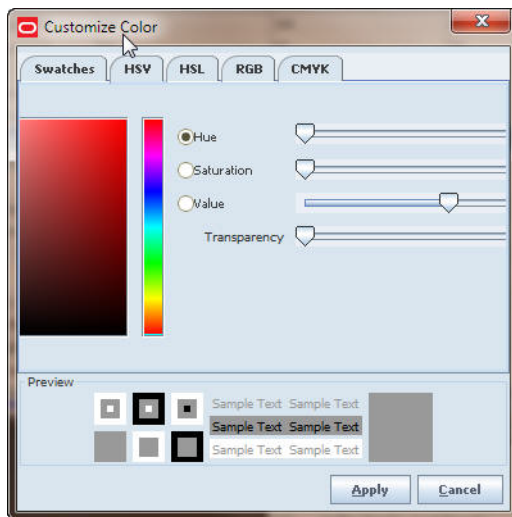
The Swatches tab shows an array of color swatches (samples). Click on any swatch to select that color.

Figure 7-6 Swatches Tab – Customize Color Window

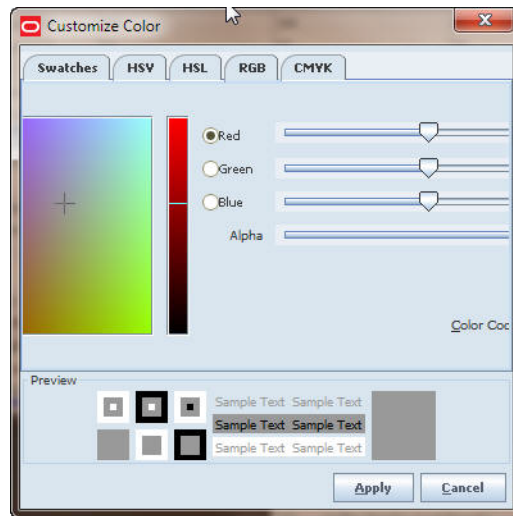


The HSV tab shows the hue, saturation, and value settings for the selected color. You can use the radio buttons and other controls to set the HSV numeric values.

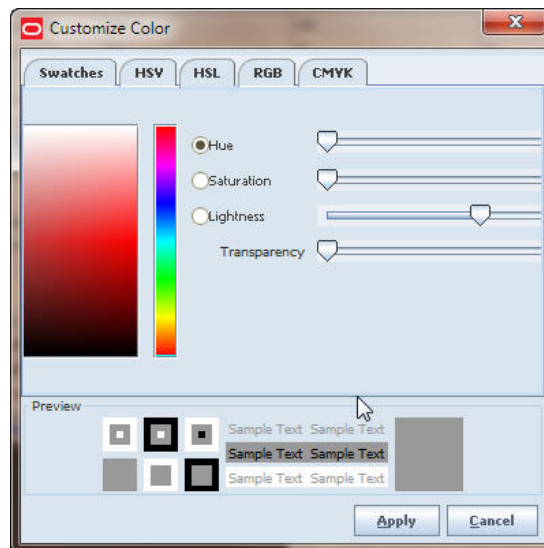
Figure 7-7 HSV Tab – Customize Color Window



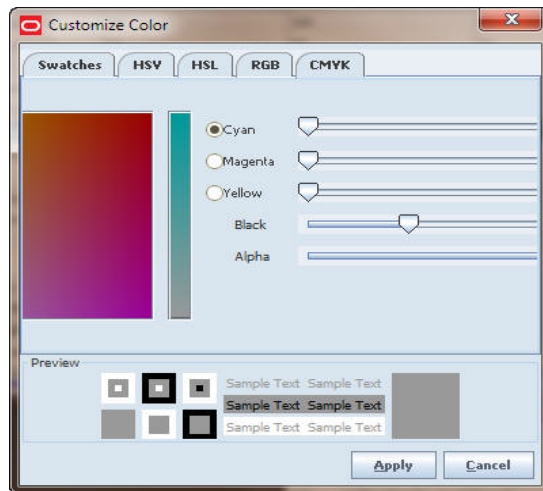
The RGB tab shows the red, green, and blue values for the selected color. You can use the controls to set the RGB numeric values.

Figure 7-8 RGB Tab – Customize Color Window

The HSL tab shows the hue, saturation, and lightness settings for the selected color. You can use the radio buttons and other controls to set the HSL numeric values.

Figure 7-9 HSL Tab – Customize Color Window

The CMYK tab shows the cyan, magenta, yellow, and key (black) settings for the selected color. You can use the radio buttons and other controls to set the CMYK numeric values.

Figure 7-10 CMYK Tab – Customize Color Window

6. Click **Apply** to set the color for the selected widgets and close the Color Detail window.
7. When you are finished changing colors, click **Save** to return to the Available Themes window.

Reset Colors

Note: Resetting colors restores default color settings when SIM was installed. Any changes you have made to colors of the selected widgets will be lost.

1. Click on the theme that you want to modify.
2. Click **Colors**. The Color Detail window opens.
3. From the list, select all of the widgets (rows) that you want to reset to their original colors.
4. Click **Reset**.
5. When you are finished, click **Save** to return to the Available Themes window.
6. Click **Back** to return to the UI Config menu.

Customize Interface Icons

To customize the icons in the user interface, you can do the following:

- [Change Icons](#)
- [Reset Icons](#)

Change Icons

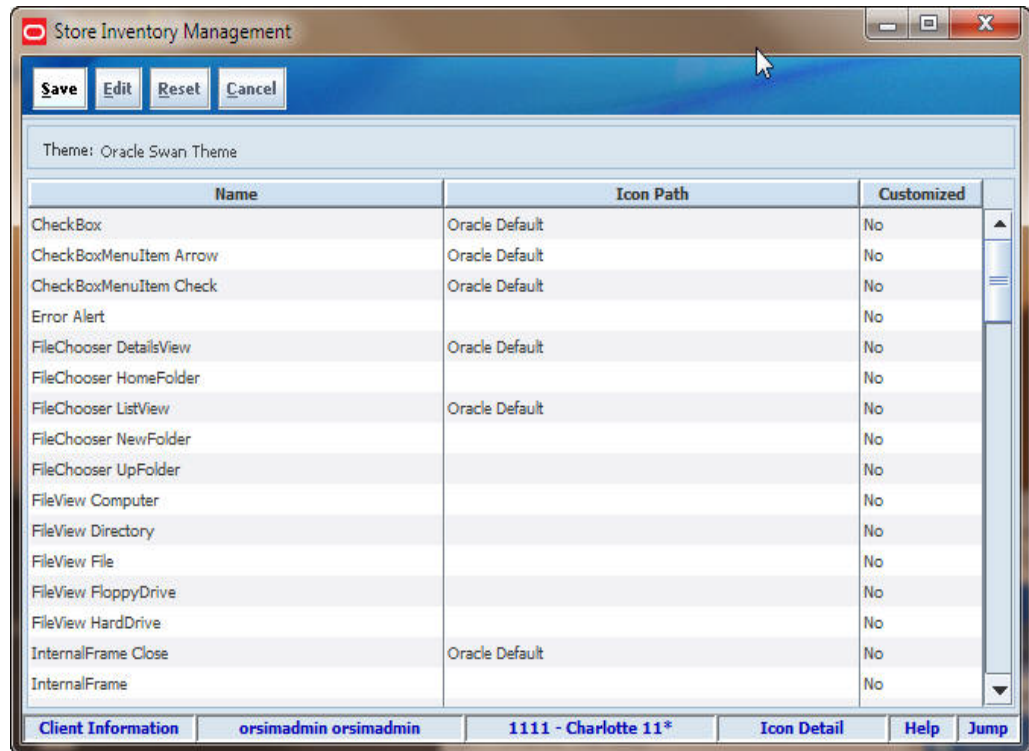
Navigate: Main Menu > Admin > UI Configuration > Customize Themes. The Available Themes window opens.

To change icons for one or more widgets (interface elements), follow these steps:

1. Click on the theme that you want to modify.

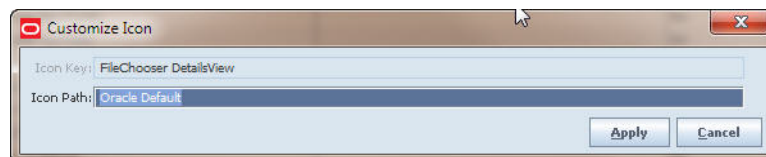
- Click **Icons**. The Icon Detail window opens. The Icon Detail window lists all of the SIM application widgets that have an icon that you can change. The Customized column indicates whether an icon has been customized (Yes or No).

Figure 7–11 Icon Detail Window



- Select one widget from the list.
- Click **Edit**. The Customize Icon window opens.

Figure 7–12 Customize Icon Window



- In the **Icon Path** field, enter the full path and file name where the icon is located. An icon file should be a GIF or JPEG file; GIF files load more quickly.

The full pathname must be in the deployed classpath of the client JVM. This means that it will probably not be on any local file system or network drive path. The practical way to accomplish this is to create a customicon.jar file at the client site that contains all of the icons. This .jar file should then be deployed as part of the Web Start deployment.

- Click **Apply** to save your change and return to the Icon Detail window.
- When you are finished, click **Save** to return to the Available Themes window.
- Click **Back** to return to the UI Config menu.

Reset Icons

Note: Resetting icons restores default icon settings when SIM was installed. Any changes you have made to icons for the selected widgets will be lost.

To reset the application icons, follow these steps:

1. Click on the theme that you want to modify.
2. Click **Icons**. The Icon Detail window opens.
3. From the list, select all of the widgets (rows) that you want to reset to use their original icons.
4. Click **Reset**.
5. When you are finished, click **Save** to return to the Available Themes window.
6. Click **Back** to return to the UI Config menu.

Activate or Deactivate a Theme

Activating a theme makes it available to other SIM users. Deactivating a theme removes that theme from the list of themes available to SIM users.

Navigate: Main Menu > Admin > UI Configuration > Customize Themes. The Available Themes window opens.

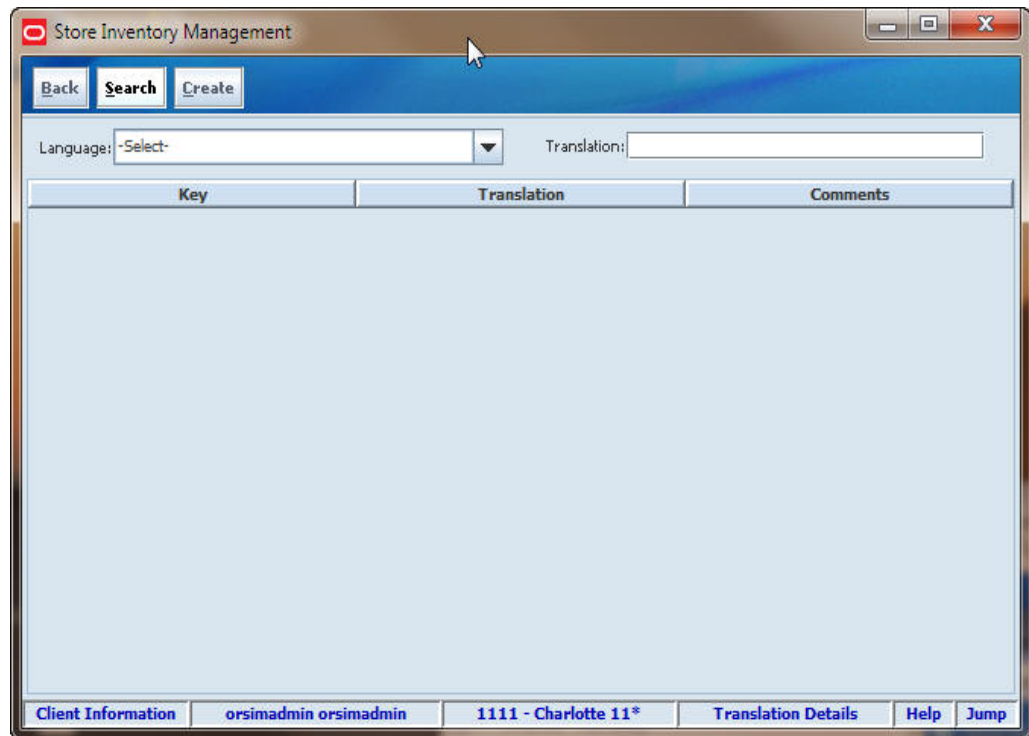
1. Double-click on the theme that you want to activate or deactivate. The Custom Theme Selection window opens.
2. Activate or deactivate the theme:
 - Select the **Active** check box to activate the theme.
 - Deselect the **Active** check box to deactivate the theme.
3. Click **Apply** to save your changes and close the Custom Theme Selection window.
4. Click **Back** to return to the UI Config menu.

Modify Translations

Note: For any translation, if you have not selected a theme that can display the language, the translations may not be displayed correctly.

Navigate: Main Menu > Admin > UI Configuration > Customize Translations. The Translation Details window opens.

Figure 7–13 Translation Details Window



To modify translated strings, follow these steps:

1. From the **Language** drop-down list, select the language for which you want to modify one or more translated strings.
2. Depending on the selected language, there may be translations that are specific to a country.

A country name is appended to a language name if the language translation varies based on geographical location. For example, a traditional form of Chinese is spoken in China, but in Taiwan there is a different Chinese language. In the Language list, there are entries for “Chinese - China” and “Chinese - Taiwan.”

3. Search for all translated strings or narrow your search:

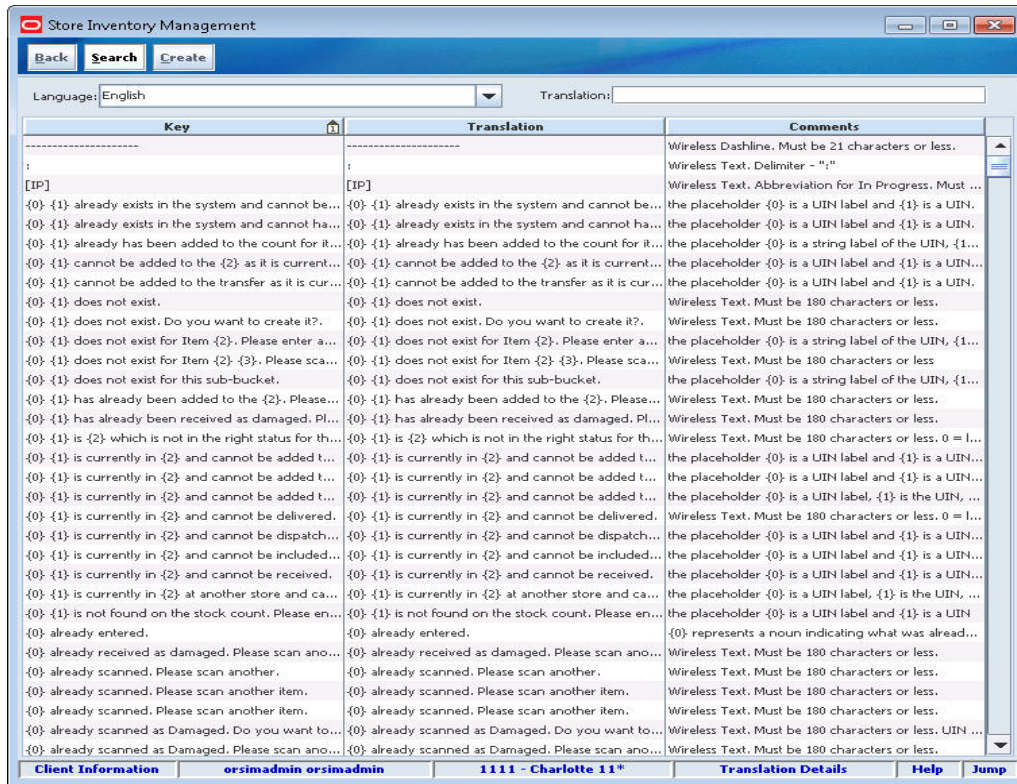
If you want to see all translated strings for the selected language, click **Search**.

If you want to narrow your search, follow these steps:

- a. Enter a search value in the **Translation** field. For example, if the selected language is French, you might want to search for the French string “retours.”
- b. Click **Search**.

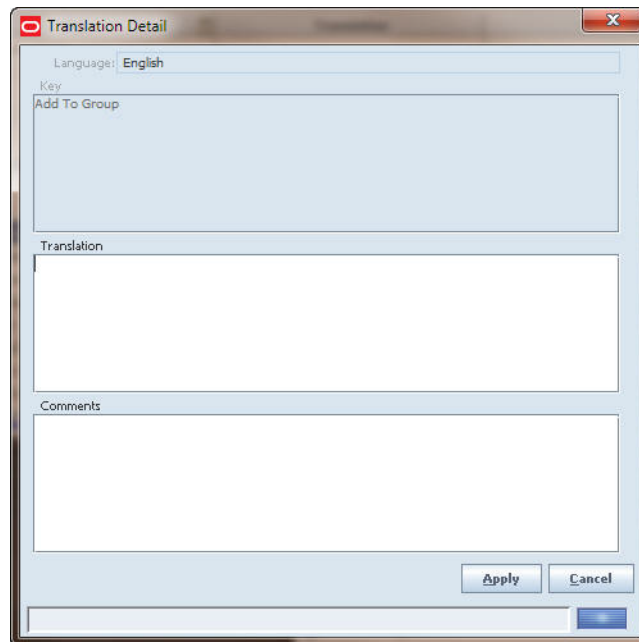
The search results are displayed in the Translation Details window. Records are sorted by Key value.

Figure 7–14 Translation Details – Example of Search Results



Note: The records returned by the search are those that contain your specified search string in the Translation column. If there are no translated strings for the selected language that contain the search string you entered in the Translation field, no records are returned.

4. To change a translated string:
 - a. Double-click on the row that contains the translation you want to change. The Translation Detail window opens.

Figure 7–15 Translation Detail Window – Example

- b. In the **Translation** field, change the translation as you want.
 - c. In the **Comments** field, enter any optional comments about the string and your translation.
 - d. Click **Apply** to save your changes and close the Translation Detail window.
5. When you are finished making changes, click **Back** in the Translation Details window. You return to the UI Config menu.

Note: Translation changes are available to users the next time they start SIM.

Create New Translations

You can also define new translated strings for the SIM interface.

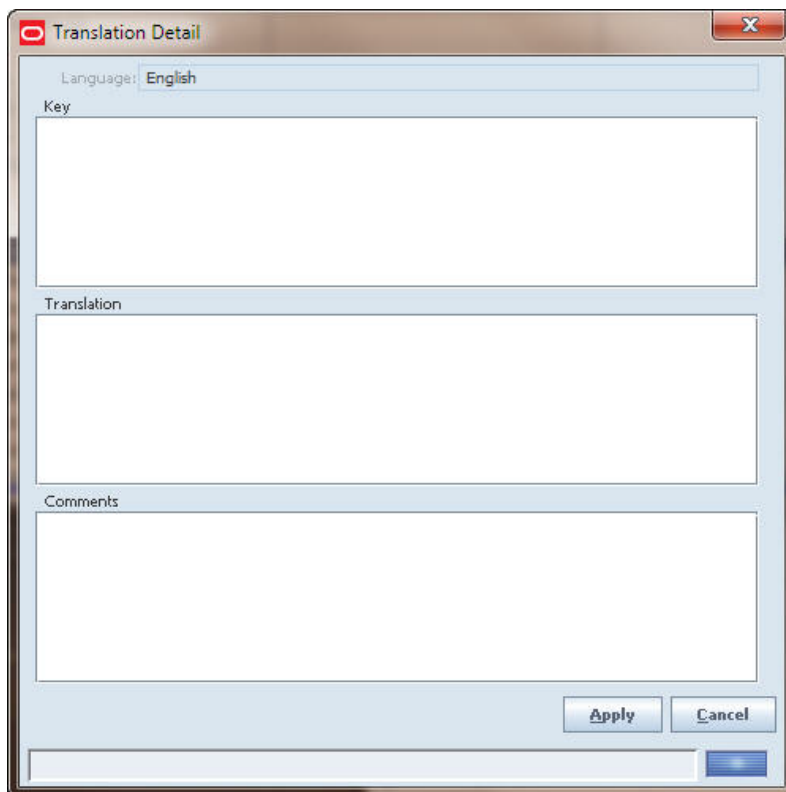
Note: For any translation, if you have not selected a theme that can display the language, the translations may not be displayed correctly.

Navigate: Main Menu > Admin > UI Configuration > Customize Translations. The Translation Details window opens.

1. From the **Language** drop-down list, select the language for which you want to add translations.

Note: The translation key and comments are created for all languages.

2. Click **Create**. The Translation Detail window opens.

Figure 7–16 Translation Detail WindowThe image shows a software window titled "Translation Detail". At the top left, there is a red close button and the title "Translation Detail". Below the title bar, there is a "Language" field with the value "English". Underneath, there are three large, empty text input fields labeled "Key", "Translation", and "Comments" from top to bottom. At the bottom right of the window, there are two buttons: "Apply" and "Cancel".

3. In the **Key** field, enter a character string, using English-language characters, that uniquely names the new translation record. The key is required, and it cannot be the same value as any existing key in the translations database.
4. In the **Translation** field, enter the translated message or string to associate with the new key. (If you leave this field blank, its value defaults to the Key value.)
5. In the **Comments** field, enter any optional comments you want about the key properties and your translation.
6. Click **Apply** to save your new translation record and close the Translation Detail window.
7. When you are finished adding translations, click **Back** in the Translation Details window. You return to the UI Config menu.

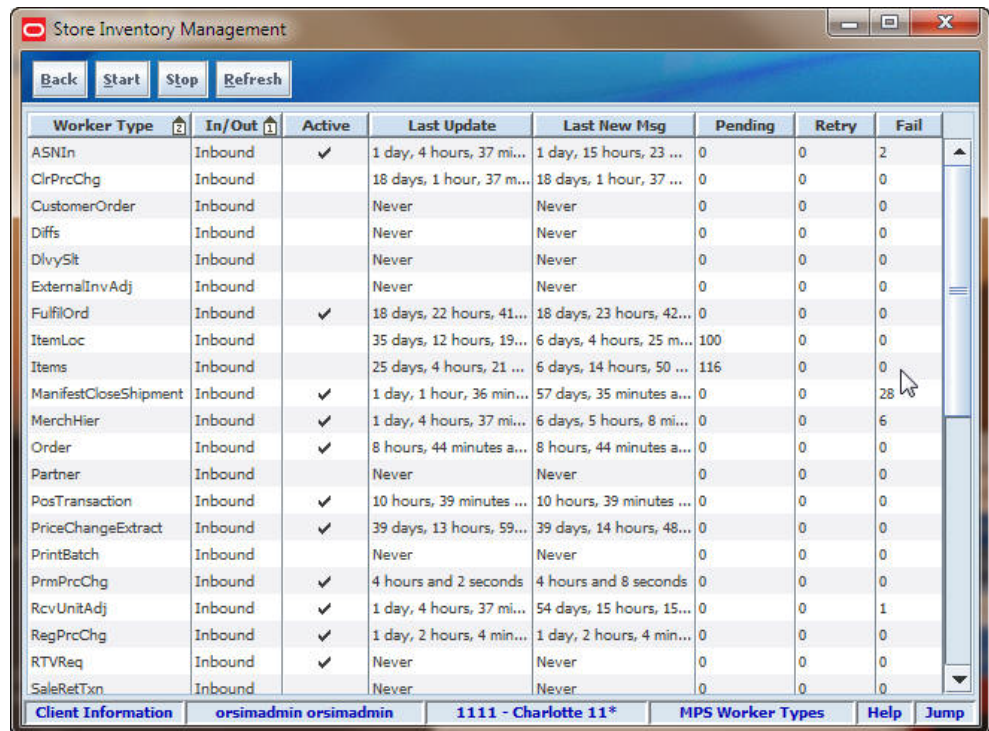
Polling Timers

Inbound and outbound SIM messages are stored in a message staging table. Messages of different types are processed by polling the staging table to retrieve and send. Polling timers control polling behavior for each message type. Through the SIM client, you can view the current status of all polling timers, and start and stop timers.

MSP Working Types Window

Navigate: Main Menu > Admin > Technical Maintenance > Message Processing System (MPS) Worker Types. The MPS Working Types window opens.

Figure 7-17 MPS Working Types Window



Worker Type	In/Out	Active	Last Update	Last New Msg	Pending	Retry	Fail
ASNIn	Inbound	✓	1 day, 4 hours, 37 mi...	1 day, 15 hours, 23 ...	0	0	2
ClrPrcChg	Inbound		18 days, 1 hour, 37 m...	18 days, 1 hour, 37 ...	0	0	0
CustomerOrder	Inbound		Never	Never	0	0	0
Diffs	Inbound		Never	Never	0	0	0
DlvySlt	Inbound		Never	Never	0	0	0
ExternalInvAdj	Inbound		Never	Never	0	0	0
FulfilOrd	Inbound	✓	18 days, 22 hours, 41...	18 days, 23 hours, 42...	0	0	0
ItemLoc	Inbound		35 days, 12 hours, 19...	6 days, 4 hours, 25 m...	100	0	0
Items	Inbound		25 days, 4 hours, 21 ...	6 days, 14 hours, 50 ...	116	0	0
ManifestCloseShipment	Inbound	✓	1 day, 1 hour, 36 min...	57 days, 35 minutes a...	0	0	28
MerchHier	Inbound	✓	1 day, 4 hours, 37 mi...	6 days, 5 hours, 8 mi...	0	0	6
Order	Inbound	✓	8 hours, 44 minutes a...	8 hours, 44 minutes a...	0	0	0
Partner	Inbound		Never	Never	0	0	0
PosTransaction	Inbound	✓	10 hours, 39 minutes ...	10 hours, 39 minutes ...	0	0	0
PriceChangeExtract	Inbound	✓	39 days, 13 hours, 59...	39 days, 14 hours, 48...	0	0	0
PrintBatch	Inbound		Never	Never	0	0	0
PrmPrcChg	Inbound	✓	4 hours and 2 seconds	4 hours and 8 seconds	0	0	0
RcvUnitAdj	Inbound	✓	1 day, 4 hours, 37 mi...	54 days, 15 hours, 15...	0	0	1
RegPrcChg	Inbound	✓	1 day, 2 hours, 4 min...	1 day, 2 hours, 4 min...	0	0	0
RTVReq	Inbound	✓	Never	Never	0	0	0
SaleRetTxn	Inbound		Never	Never	0	0	0

The MPS Working Types table lists the following information about the MPS working types.

Column	Description
Worker Type	Name of the working type.
In/Out	Whether messages are inbound or outbound.
Active	Whether the working type is active (started and running) or inactive (stopped). A check mark in this column indicates that the working type is active.
Last Update	Last time this working type was actively processing messages.
Last New Msg	Last time a new message arrived at the staging table for this family.
Pending	Number of messages in pending status for the worker type.
Retry	Number of messages/records in retry status for the worker type.
Fail	Number of messages/records in failed status for the working type.

From the MPS Worker Types window, you can do the following:

- [Stop or Start an MPS Working Type](#)
- [Refresh the MPS Working Type List Display](#)

From the MPS Worker Types window, click **Back** to return to the Technical Maintenance menu.

Stop or Start an MPS Working Type

To start or stop working types, follow these steps:

1. In the working types list, select one or more of the working types that you want to start or stop.
2. Click **Stop** to stop the selected working types, or click **Start** to start them.

Refresh the MPS Working Type List Display

Click **Refresh** to refresh the working types status display.

Configure a MPS Working Type

Working Type parameters can be configured in the server.cfg file.

For more information, see “server.cfg” in the *Oracle Retail Store Inventory Management Operations Guide*.

MPS Staged Messages

Inbound and outbound SIM MPS system messages are stored in a message staging table. Through polling, messages are retrieved and processed by SIM or by external applications that are integrated with SIM.

Messages remain in the staging table until they are retrieved and processed successfully. The status of each staged message is one of the following:

- **Pending** – The message is new and waiting to be retrieved.
- **Retry** – One or more attempts were not successful, and the message will be retried again.
- **Fail** – The message has been retried the maximum number of times and has not been processed successfully.

Messages can fail because of errors in content or for other reasons. You can handle staged messages in the following ways:

- Edit the content of a message and retry the corrected message
- Reset the retry counter for the message so that it will be retried
- Delete the message

MPS Staged Message Lookup Window

Navigate: Main Menu > Admin > Technical Maintenance > MSP Staged Messages. The MSP Staged Message Lookup window opens.

Figure 7–18 MPS Staged Message Lookup Window

Record ID	In/Out	Type	Family	Create Time	Update Time	Retry Count	Business ID	Job ID	Message Desc
278324	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:06:49 PM	Aug 26, 2013 11:50:45 AM	29	1607	278318	
278326	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:06:49 PM	Aug 26, 2013 11:50:44 AM	28	1621	278318	
278329	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:06:49 PM	Aug 26, 2013 11:50:44 AM	28	1622	278318	
278328	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:49:08 PM	Aug 26, 2013 11:50:45 AM	28	942	278358	
278360	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:49:08 PM	Aug 26, 2013 11:50:45 AM	29	1305	278358	
278370	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:49:08 PM	Aug 26, 2013 2:41:22 PM	4	1164	278358	
278373	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:49:08 PM	Aug 26, 2013 11:50:44 AM	28	1201	278358	
278374	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:49:08 PM	Aug 26, 2013 11:50:44 AM	28	1206	278358	
278375	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:49:08 PM	Aug 26, 2013 11:50:44 AM	28	1247	278358	
278376	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:49:08 PM	Aug 26, 2013 11:50:44 AM	28	1043	278358	
278377	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:49:08 PM	Aug 26, 2013 11:50:44 AM	28	1042	278358	
278380	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:52:10 PM	Aug 26, 2013 11:50:44 AM	28	1203	278389	
278383	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:52:10 PM	Aug 26, 2013 11:50:44 AM	28	1362	278389	
278386	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:52:10 PM	Aug 26, 2013 11:50:44 AM	28	961	278389	
278397	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:52:10 PM	Aug 26, 2013 11:50:44 AM	28	742	278389	
278398	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:52:10 PM	Aug 26, 2013 11:50:44 AM	28	822	278389	
278409	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:52:10 PM	Aug 26, 2013 11:50:44 AM	28	1043	278389	
278410	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:52:10 PM	Aug 26, 2013 11:50:44 AM	28	1081	278389	
278411	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:52:10 PM	Aug 26, 2013 11:50:44 AM	28	1421	278389	
278412	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:52:10 PM	Aug 26, 2013 11:50:44 AM	28	1164	278389	
278413	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:52:10 PM	Aug 26, 2013 11:50:44 AM	28	2121	278389	
278414	Inbound	ManifestCloseShipment	ManifestCloseShipment	Jul 1, 2013 3:52:10 PM	Aug 26, 2013 11:50:44 AM	28	2122	278389	
281796	Inbound	RecvLinkAdjCre	RecvLinkAdj	Jul 4, 2013 11:52:56 AM	Aug 26, 2013 11:50:44 AM	28	4646	281796	LOCATION_ID=4646 PO...
281814	Inbound	VendorAddrCre	Vendor	Jul 4, 2013 11:52:56 AM	Aug 26, 2013 11:50:44 AM	28	9191	281814	SUPPLIER_ID=9191
287673	Inbound	VendorAddrCre	Vendor	Jul 11, 2013 1:55:39 AM	Aug 26, 2013 11:50:44 AM	28	9197	287673	SUPPLIER_ID=9197
297810	Inbound	SubItemMod	Merchant	Jul 24, 2013 4:41:52 AM	Aug 26, 2013 11:50:44 AM	28	142020	297810	DEPT_ID=2020 CLASS_I...
320257	Inbound	ASINCre	ASIN	Aug 14, 2013 4:21:56 AM	Aug 26, 2013 11:50:44 AM	28	320257	320257	ASIN=vr10004
320599	Inbound	ClassCre	Merchant	Aug 14, 2013 6:11:49 AM	Aug 26, 2013 11:50:44 AM	28	11939	320599	DEPT_ID=1939 CLASS_I...
320600	Inbound	SubItemCre	Merchant	Aug 14, 2013 6:11:58 AM	Aug 26, 2013 11:50:44 AM	28	11939	320600	DEPT_ID=1939 CLASS_I...
322265	Inbound	ASINCre	ASIN	Aug 15, 2013 11:35:59 PM	Aug 26, 2013 11:50:44 AM	28	322265	322265	ASIN=vr10004
322330	Inbound	SOCre	StockOrder	Aug 16, 2013 11:52:36 AM	Aug 26, 2013 11:50:44 AM	16	103000121555	322330	DISTRC_NUM=10300012...
322784	Inbound	SOCre	StockOrder	Aug 19, 2013 4:50:58 AM	Aug 26, 2013 11:50:44 AM	16	103000121638	322784	DISTRC_NUM=10300012...
325265	Inbound	ClassCre	Merchant	Aug 21, 2013 11:19:39 AM	Aug 26, 2013 11:50:43 AM	16	74321	325265	DEPT_ID=4321 CLASS_I...
325266	Inbound	SubItemCre	Merchant	Aug 21, 2013 11:19:39 AM	Aug 26, 2013 11:50:43 AM	16	174321	325266	DEPT_ID=4321 CLASS_I...
325267	Inbound	SubItemCre	Merchant	Aug 21, 2013 11:19:39 AM	Aug 26, 2013 11:50:43 AM	16	274321	325267	DEPT_ID=4321 CLASS_I...

The MPS Staged Messages Lookup window displays the following information about staged messages:

Field	Description
Record ID	Unique record ID for the message
In/Out	Whether the message is inbound or outbound
Type	Type of message (similar to type used in the Oracle Retail Integration Bus)
Family	Staging table to which the message belongs
Create Time	Time the message was created
Update Time	Last time the message was updated
Retry Count	Number of times the message has been retried
Business ID	Unique ID of the transaction, used to group messages that need to be processed in order and atomically
Job ID	The identification number for the job
Message Desc	Message description (human-readable hints of message contents)

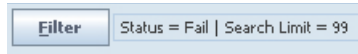
From the MPS Staged Message Lookup window, you can do the following:

- [Filter the MPS Staged Message Lookup List](#)
- [View and Edit MSP Staged Messages](#)
- [Delete MPS Staged Messages](#)
- [Refresh the MPS Staged Message Lookup List](#)
- [Reset MPS Staged Messages](#)

From the MPS Staged Messages Lookup window, click **Back** to return to the Technical Maintenance menu.

Filter the MPS Staged Message Lookup List

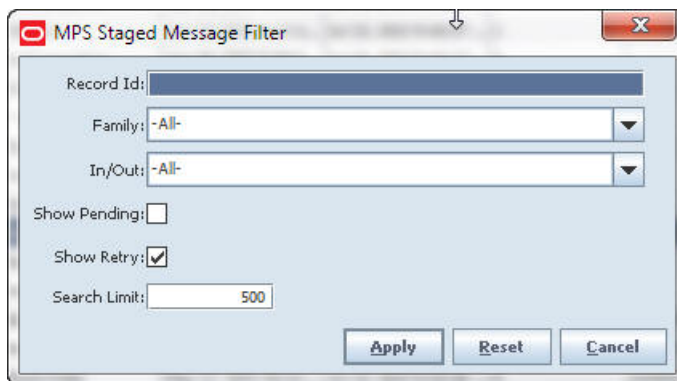
Whenever the MSP Staged Message Lookup window is displayed, you can filter the list of MPS staged messages to limit the requests listed. If the list is currently filtered, the filtering is shown next to the Filter button.



To filter the list of MPS staged messages or to change the current filtering, follow these steps:

1. In the MPS Staged Message Lookup window, click **Filter**. The MPS Staged Message Filter window opens.

Figure 7–19 MPS Staged Message Filter Window



2. If you want to reset all filtering criteria to default values, click **Reset**.
3. Enter or select search values as needed to specify the MPS staged messages that you want to list. All values are optional. If you leave a field blank or select All, all values are included in the search.

Record ID – If you know the Record ID of the MPS staged message you want to view, enter the value.

Family – The default value is All.

In/Out – The default value is All.

Show Pending – Select this check box if you want to include messages in pending status.

Show Retry – Select this check box if you want to include messages in retry status.

4. If you want to change the limit of the number of messages listed, enter an integer value in the **Search Limit** field. The default value is 500.
5. Click **Apply**. You return to the MPS Staged Messages Lookup window, where your filter has been applied.

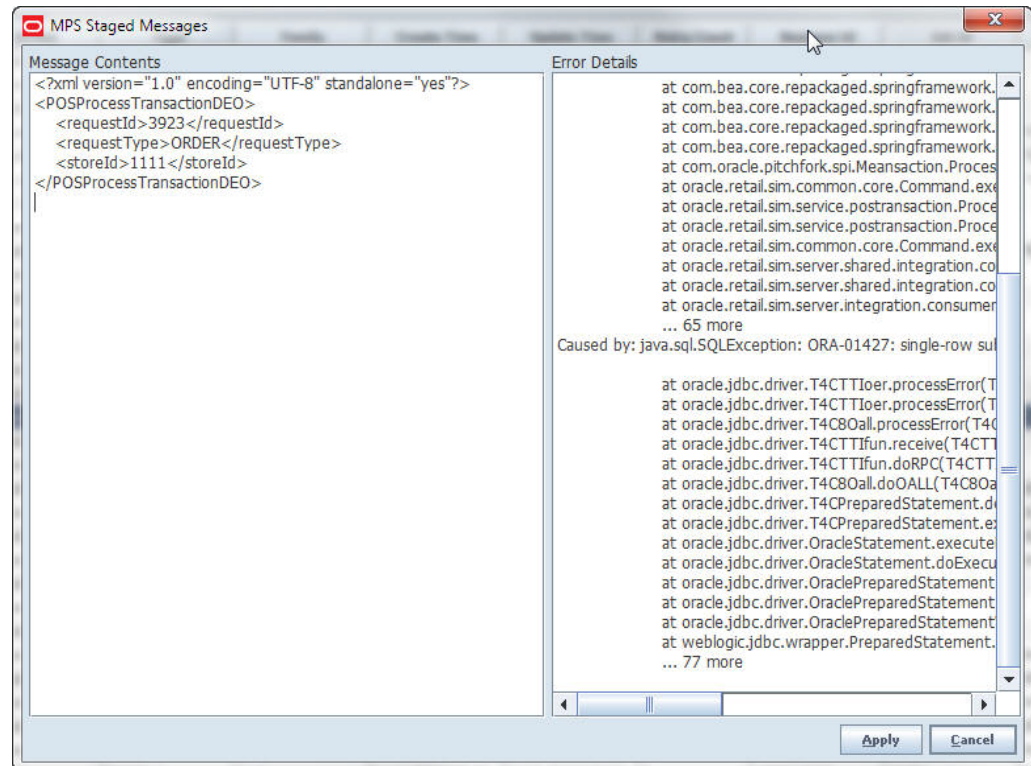
View and Edit MSP Staged Messages

You can view the content of any listed message. You can also edit the XML message contents if you want to correct an error and retry the corrected message.

To view or edit a MPS staged message, follow these steps:

1. In the MPS Staged Messages Lookup window, double-click on the message you want to view or edit. The MPS Staged Messages window opens.

Figure 7–20 MPS Staged Messages Window



2. If you want to edit the content of the message, change the content as needed in the Message Contents pane.

Note: You receive an error message if you attempt to save a changed message that contains invalid XML code.

3. Click **Apply** to save changes, or click **Cancel** to leave the message unchanged. You return to the MPS Staged Message Lookup window.

Delete MPS Staged Messages

You can delete any listed MPS staged message. To delete one or more MPS staged messages, follow these steps:

1. Select the messages that you want to delete.
2. Click **Delete**.

You received the following messages: “Are you sure you want to delete the selected items now?”

3. Click **Yes** to delete the selected messages.

Refresh the MPS Staged Message Lookup List

Click **Refresh** to refresh the MPS Staged Message Lookup list display.

Reset MPS Staged Messages

You can reset the retry count for any listed message, so that the message is retried again the maximum number of times. To reset one or more MPS staged messages, follow these steps:

1. Select the messages that you want to reset.
2. Click **Reset**. The Retry Count values for the selected messages are reset to zero.

Setup/Print Setup

Setup functions include a variety of administrative functions to configure SIM. These functions are primarily system settings that affect all SIM users at a single store or throughout the enterprise.

Note: Most Setup functions are available only to system administrators or other users with the necessary permissions.

The functions available on the Setup menu are as follows:

- [SIM Stores](#)
- [Store Administration](#)
- [Store Defaults Administration](#)
- [System Administration](#)
- [UIN Attributes](#)

See [Chapter 5, "Unique Identification Numbers \(UIN\),"](#) for information about universal identification numbers and their setup and maintenance

- [Inventory Adjustment Reason Maintenance](#)
- [Shipment Reason Maintenance](#)
- [Tolerances](#)
- [Extended Attributes Setup](#)

The Print functions allow administrators or other authorized personnel to add, change, or remove printers used for SIM reports, tags, and labels. The functions available on the Print Setup menu are as follows:

- [Print Formats](#)
- [Hierarchy Format](#)
- [UDA Print Setup](#)
- [Print Setup](#)

SIM Stores

The SIM Stores functions allow you to set operating parameters for stores managed with SIM. The functions are as follows:

- [Add or Remove Buddy Stores](#)

You can set up buddy stores within the transfer zone in SIM to which you normally transfer items. This shortens the list of values from which you must select when you create a transfer.

- **Auto-Receive Stores**

You can set up auto-receive stores from which you want to receive transfers automatically. The stock on hand of the receiving store is adjusted automatically when an auto-receive store dispatches a transfer.

- **SIM Managed Stores**

You can add or remove stores that are managed using SIM.

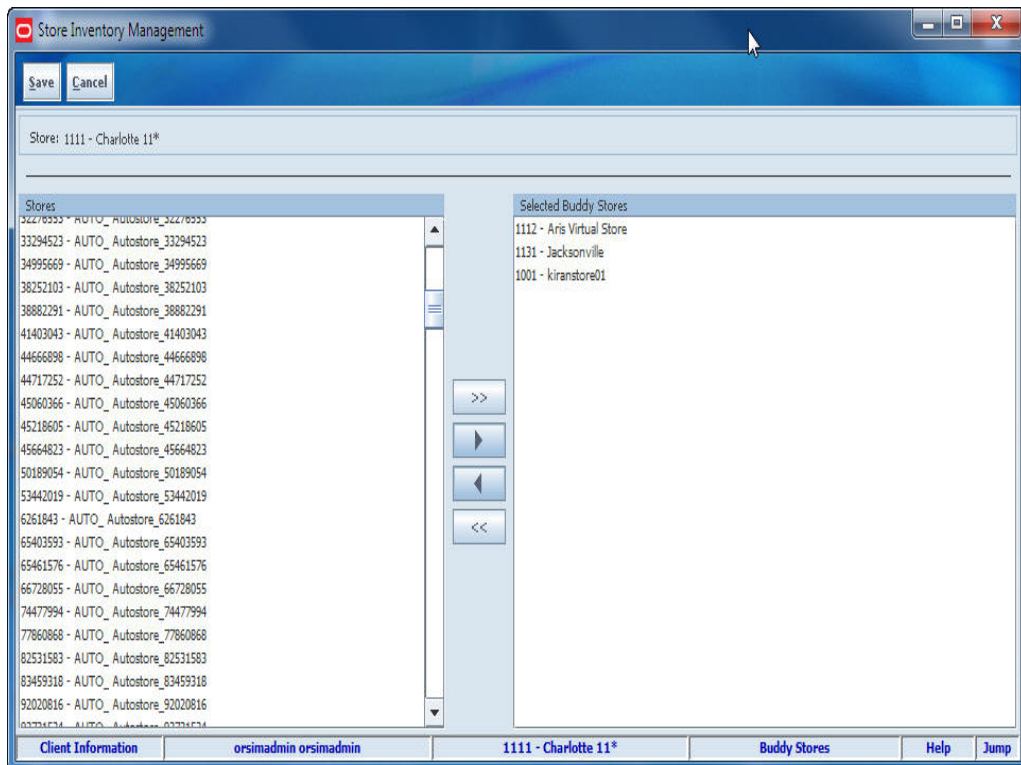
Add or Remove Buddy Stores

Buddy stores are stores within the same transfer zone that frequently transfer items between stores. You can set up buddy stores to make the frequent transfers between these stores more convenient.

You can transfer items between any stores within the transfer zone, regardless of whether they are set up as buddy stores.

Navigate: Main Menu > Admin > Setup > SIM Stores > Buddy Stores. The Buddy Stores window opens.

Figure 8–1 Buddy Stores Window



To add or remove buddy stores, follow these steps to change which stores are included in the Selected Buddy Stores list.

1. Add buddy stores:
 - a. In the **Stores** list, select the stores you want to set up as buddy stores.

- b. Click the right-arrow button. The selected stores are moved to the Selected Buddy Stores list.

To add all stores from the Stores list, click the double-right-arrow button.

2. Remove buddy stores:

- a. In the **Selected Buddy Stores** list, select the stores you want to remove from the list.
- b. Click the left-arrow button. The selected stores are moved to the Stores list and removed from the Selected Buddy Stores list.

To remove all stores from the Selected Buddy Stores list, click the double-left-arrow button.

3. Click **Save** to return to the Store Admin menu.

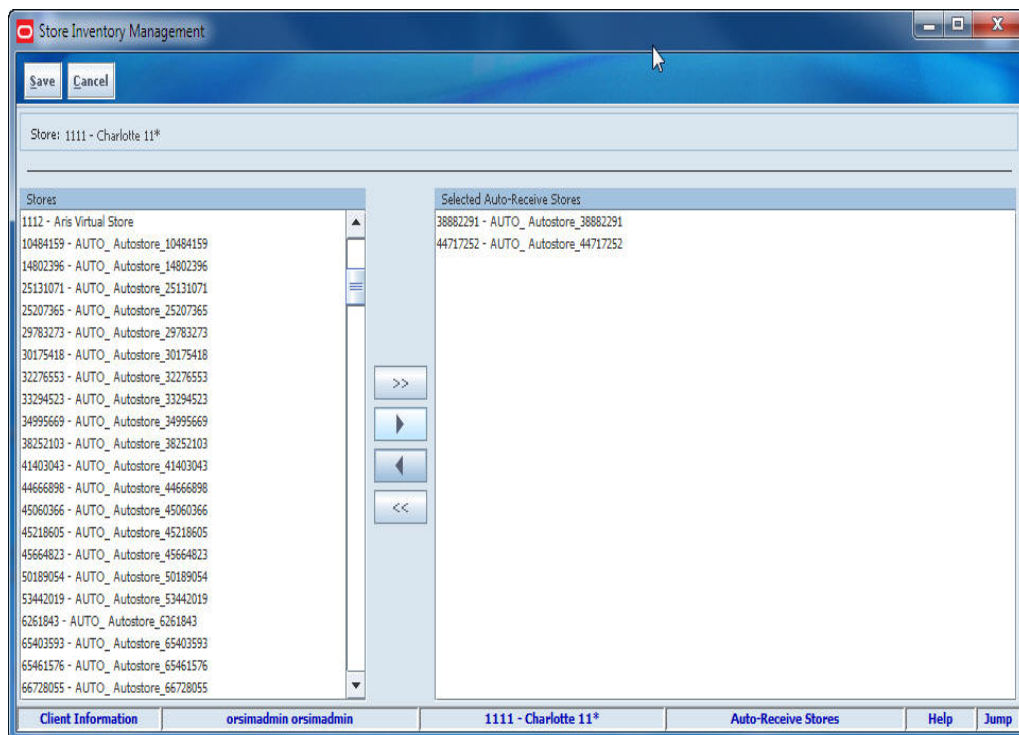
Auto-Receive Stores

Auto-receive stores are stores from which you want to receive transfers automatically. The stock on hand at the receiving store is adjusted automatically by SIM when a transfer is dispatched from an auto-receive store.

SIM will validate the quantity matches. When a match occurs, the UINs will be moved into in stock and the receipt completed. The UINs will be set to In Stock.

Navigate: Main Menu > Admin > Setup > SIM Stores> Auto-Receive Stores. The Auto-Receive Stores window opens.

Figure 8–2 Auto-Receive Stores Window



To add or remove auto-receive stores, follow these steps to change which stores are included in the Selected Auto-Receive Stores list.

1. Add auto-receive stores:

- a. In the Stores list, select the stores you want to set up as auto-receive stores.
- b. Click the right-arrow button. The selected stores are moved to the Selected Auto-Receive Stores list.

To add all stores from the Stores list, click the double-right-arrow button.

2. Remove auto-receive stores:

- a. In the Selected Auto-Receive Stores list, select the stores you want to remove from the list.
- b. Click the left-arrow button. The selected stores are moved to the Stores list and removed from the Selected Auto-Receive Stores list.

To remove all stores from the Selected Auto-Receive Stores list, click the double-left-arrow button.

3. Click **Save** to return to the Store Admin menu.

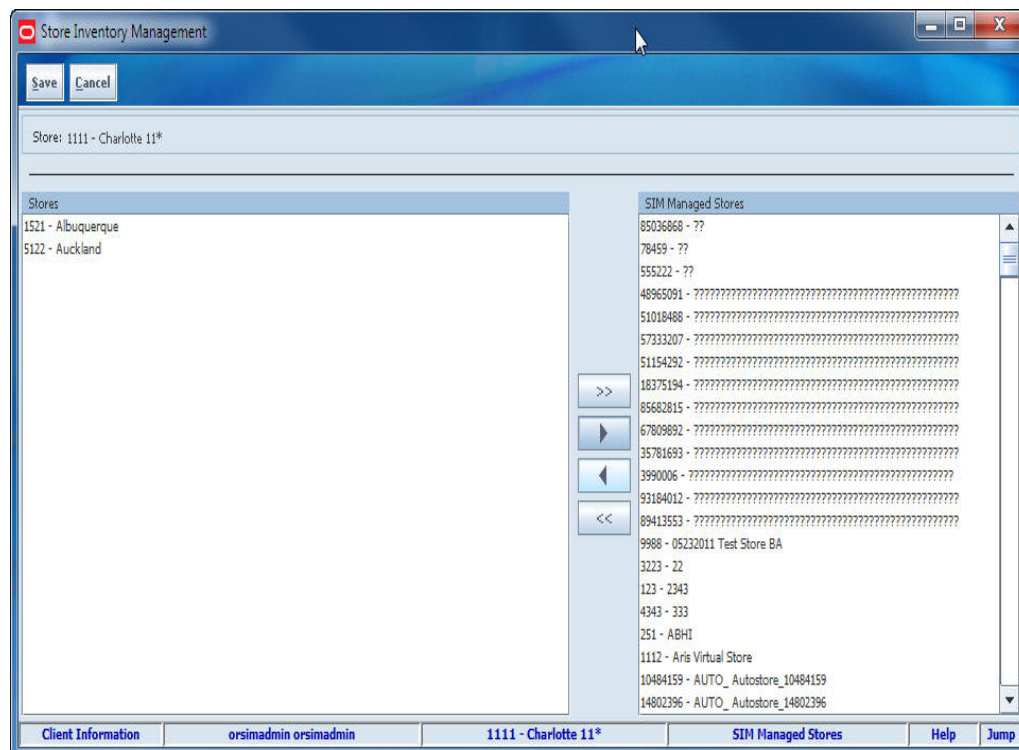
Note: To auto receive the store administration options need to be configured appropriately. See the administration guide store administration option for more information.

SIM Managed Stores

SIM managed stores are stores that use the SIM application. When a store is listed as a SIM managed store, SIM does not send receiving integration messages when auto-receiving. This allows you to move stores into the SIM database, while still using a legacy system to manage some stores, with shipped transfers closed properly in SIM.

Navigate: Main Menu > Admin > Setup > SIM Stores > SIM Managed Stores. The SIM Managed Stores window opens.

Figure 8-3 SIM Managed Stores Window



To add or remove SIM stores, follow these steps to change which stores are included in the SIM Managed Stores list.

1. Add SIM stores:
 - a. In the Stores list, select the stores you want to list as SIM managed stores.
 - b. Click the right-arrow button. The selected stores are moved to the SIM Managed Stores list.

To add all stores from the Stores list, click the double-right-arrow button.

2. Remove SIM stores:
 - a. In the SIM Managed Stores list, select the stores you want to remove from the list.
 - b. Click the left-arrow button. The selected stores are moved to the Stores list and removed from the SIM Managed Stores list.

To remove all stores from the SIM Managed Stores list, click the double-left-arrow button.

3. Click **Save** to return to the Store Admin menu.

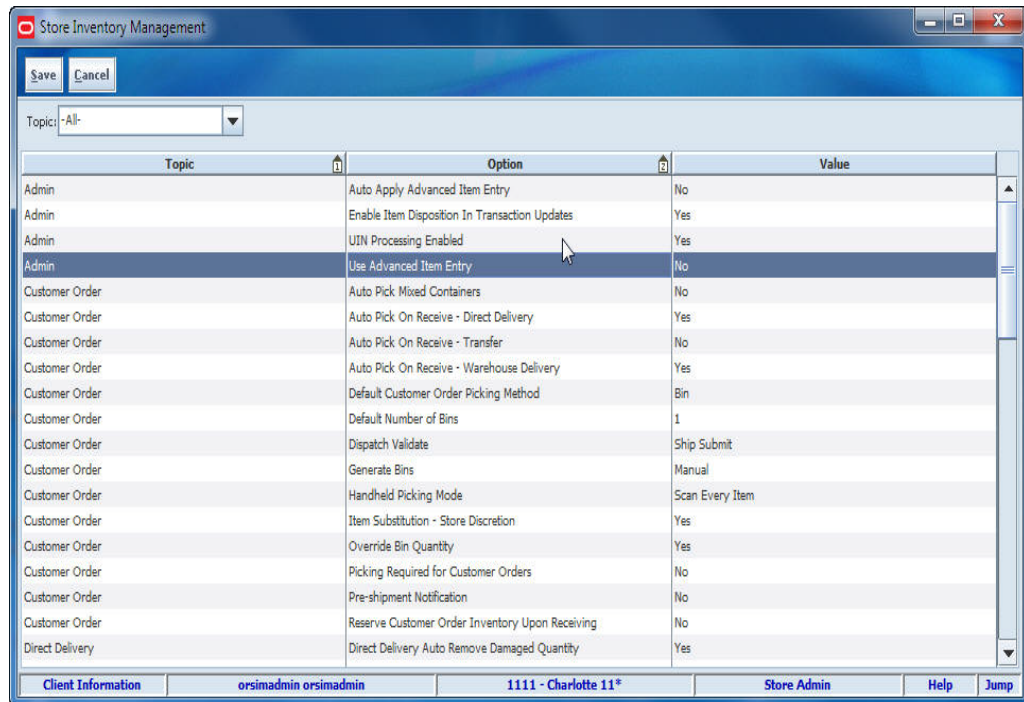
Store Administration

Through the Store Admin window, the administrator can set values for options that control a variety of SIM behaviors. The values of these options apply only to the location at which you are currently logged in.

See the *Store Inventory Management Implementation Guide* for information about the store administration options.

Navigate: Main Menu > Admin > Setup > Store Admin. The Store Admin window opens.

Figure 8–4 Store Admin Window



To edit store administration options, follow these steps:

1. If you want to limit the options listed, select a topic from the **Topic** field. (The complete list of options is grouped into smaller topics, each related to a functional area of SIM.)
2. Select the option that you want to modify.
3. Double-click the **Value** field and set the option value in either of these ways:
 - Select a value from the drop-down list.
 - Enter a value in the field.
4. Click **Save** to save your changes and return to the Setup menu.

Store Defaults Administration

The store defaults administration function allows the system administrator to set default values for options that control a variety of SIM behaviors. The values of these store defaults are applied to all new locations that are added.

See the *Store Inventory Management Implementation Guide* for information about the system default options.

Navigate: Main Menu > Admin > Setup > Store Defaults Admin. The Store Defaults Admin window opens.

Figure 8-5 Store Defaults Admin Window

Topic	Option	Value
Admin	Auto Apply Advanced Item Entry	No
Admin	Enable Item Disposition In Transaction Updates	Yes
Admin	UIN Processing Enabled	Yes
Admin	Use Advanced Item Entry	No
Customer Order	Auto Pick Mixed Containers	No
Customer Order	Auto Pick On Receive - Direct Delivery	Yes
Customer Order	Auto Pick On Receive - Transfer	No
Customer Order	Auto Pick On Receive - Warehouse Delivery	Yes
Customer Order	Default Customer Order Picking Method	Bin
Customer Order	Default Number of Bins	1
Customer Order	Dispatch Validate	Ship Submit
Customer Order	Generate Bins	Manual
Customer Order	Handheld Picking Mode	Scan Every Item
Customer Order	Item Substitution - Store Discretion	Yes
Customer Order	Override Bin Quantity	Yes
Customer Order	Picking Required for Customer Orders	No
Customer Order	Pre-shipment Notification	No
Customer Order	Reserve Customer Order Inventory Upon Receiving	No
Direct Delivery	Direct Delivery Auto Remove Damaged Quantity	Yes

To setup store defaults, follow these steps:

1. If you want to limit the options listed, select a topic from the Topic field. (The complete list of options is grouped into smaller topics, each related to a functional area of SIM.)
2. Select the option that you want to modify.
3. Double-click the **Value** field and set the option value in either of these ways:
 - Select a value from the drop-down list.
 - Enter a value in the field.
4. Click **Save** to save your changes and return to the Store Defaults Admin menu.

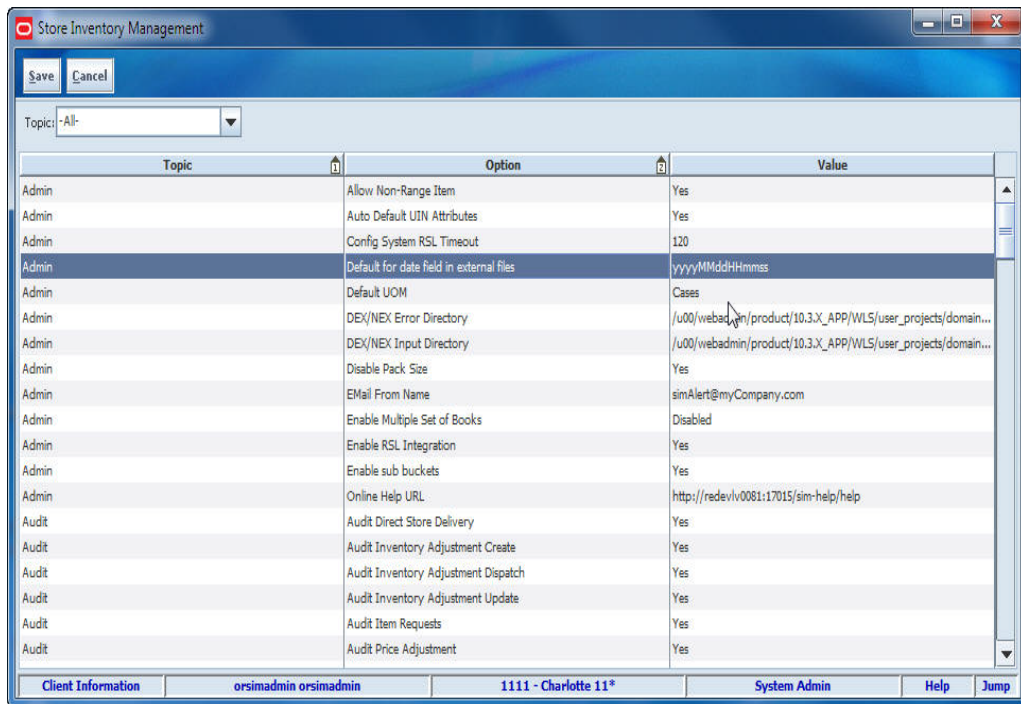
System Administration

The system administration function allows the system administrator to set values for options that control a variety of SIM behaviors. The values of these system options are applied to all locations.

See the *Store Inventory Management Implementation Guide* for information about the system administration options.

Navigate: Main Menu > Admin > Setup > System Admin. The System Admin window opens.

Figure 8–6 System Admin Window



To edit system options, follow these steps:

1. If you want to limit the options listed, select a topic from the **Topic** field. (The complete list of options is grouped into smaller topics, each related to a functional area of SIM.)
2. Select the option that you want to modify.
3. Double-click the **Value** field and set the option value in either of these ways:
 - Select a value from the drop-down list.
 - Enter a value in the field.
4. Click **Save** to save your changes and return to the Setup menu.

Inventory Adjustment Reason Maintenance

You can add, change, and delete reason codes used for inventory adjustments. In addition to showing the reasons for inventory adjustments, reason codes also specify how inventory adjustments affect stock on hand, unavailable inventory, or customer order reserve inventory.

Note: Only users with the required permissions can add, change, or delete reason codes.

Navigate: Main Menu > Admin > Setup > Inv. Adj. Reason. The Inventory Adjustment Reason Maintenance window opens.

Figure 8–7 Inventory Adjustment Reason Maintenance Window

Code	Description	Use in UI	Disposition	To Sub-bucket	From Sub-bucket	Publish	System
1	Wastage	<input type="checkbox"/>	- Stock On Hand			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Shrinkage	<input checked="" type="checkbox"/>	- Stock On Hand			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Repair - In	<input checked="" type="checkbox"/>	- Unavailable		Trouble	<input checked="" type="checkbox"/>	<input type="checkbox"/>
75	Stock Count Unavailable To Missing	<input type="checkbox"/>	- Unavailable		Trouble	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
76	Unit Late Sales Increase SOH	<input type="checkbox"/>	+ Stock On Hand			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
77	Unit Late Sales Decrease SOH	<input type="checkbox"/>	- Stock On Hand			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
78	Unit and Amount Late Sales Increase ...	<input type="checkbox"/>	+ Stock On Hand			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
79	Unit and Amount Late Sales Decrease ...	<input type="checkbox"/>	- Stock On Hand			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
81	Damaged - Out	<input checked="" type="checkbox"/>	- Stock On Hand			<input checked="" type="checkbox"/>	<input type="checkbox"/>
82	Damaged - Hold	<input checked="" type="checkbox"/>	+ Unavailable	Trouble		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
83	Theft	<input checked="" type="checkbox"/>	- Stock On Hand			<input checked="" type="checkbox"/>	<input type="checkbox"/>
84	Store Use	<input checked="" type="checkbox"/>	- Stock On Hand			<input checked="" type="checkbox"/>	<input type="checkbox"/>
85	Repair - Out	<input checked="" type="checkbox"/>	+ Unavailable	Trouble		<input checked="" type="checkbox"/>	<input type="checkbox"/>
86	Charity	<input checked="" type="checkbox"/>	- Stock On Hand			<input checked="" type="checkbox"/>	<input type="checkbox"/>
87	Stock Count In	<input type="checkbox"/>	+ Stock On Hand			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
88	Stock Count Out	<input type="checkbox"/>	- Stock On Hand			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
89	Dispose from on Hold	<input checked="" type="checkbox"/>	- Stock On Hand & - Unavailable		Trouble	<input checked="" type="checkbox"/>	<input type="checkbox"/>
90	Dispose from SOH	<input checked="" type="checkbox"/>	- Stock On Hand			<input checked="" type="checkbox"/>	<input type="checkbox"/>
91	Stock - Hold	<input checked="" type="checkbox"/>	+ Unavailable	Trouble		<input checked="" type="checkbox"/>	<input type="checkbox"/>
92	Admin	<input checked="" type="checkbox"/>	- Stock On Hand			<input checked="" type="checkbox"/>	<input type="checkbox"/>
93	Store Customer Return	<input checked="" type="checkbox"/>	+ Stock On Hand			<input checked="" type="checkbox"/>	<input type="checkbox"/>
94	Product Transformation In	<input checked="" type="checkbox"/>	+ Stock On Hand			<input checked="" type="checkbox"/>	<input type="checkbox"/>
95	Consignment	<input checked="" type="checkbox"/>	- Stock On Hand			<input checked="" type="checkbox"/>	<input type="checkbox"/>
96	Ready to Sell	<input checked="" type="checkbox"/>	- Unavailable		Trouble	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
97	Returns	<input type="checkbox"/>	- Unavailable		Trouble	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
98	Product Transformation Out	<input checked="" type="checkbox"/>	- Stock On Hand			<input checked="" type="checkbox"/>	<input type="checkbox"/>
145	- due to Return	<input type="checkbox"/>	+ Unavailable	Trouble		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

From the Inventory Adjustment Reason Maintenance window, you can do the following:

- [Add an Inventory Adjustment Reason Code](#)
- [Edit an Inventory Adjustment Reason Code](#)
- [Delete Inventory Adjustment Reason Codes](#)

From the Inventory Adjustment Reason window, click **Save** to return to the Setup menu.

Add an Inventory Adjustment Reason Code

Navigate: Main Menu > Admin > Setup > Inv. Adj. Reason. The Inventory Adjustment Reason Maintenance window opens.

To add an inventory adjustment reason, follow these steps:

1. Click **Add**.

A new blank row is inserted at the end of the list of inventory adjustment reasons.

2. Complete the fields for the new inventory adjustment reason as follows.

Note: The Code and Description values for the reason code must match the values used in the Oracle Retail Merchandising System (RMS).

Code – Enter a new unique identifier of the inventory adjustment reason. If you enter a duplicate value, an error message is displayed.

Description – Enter a description of the inventory adjustment reason code.

Use In UI – Select this check box if you want the reason code to be available in the SIM user interface for SIM users to select. If you do not want this reason code to be available to SIM users, do not select this check box.

Disposition – From the drop-down list, select a Disposition value that specifies how inventory adjustments with this reason code affect SIM inventory counts. A plus (+) value specifies that stock on hand, unavailable, or customer order reserve inventory is increased by the adjustment. A minus (-) sign specifies that the inventory is decreased.

These Disposition values are available:

- Stock On Hand
- + Unavailable
- + Stock On Hand
- Unavailable
- + Customer Order Reserve
- Customer Order Reserve
- Stock On Hand & - Unavailable
- Unavailable & + Unavailable

Note: Use dispositions that affect Customer Order Reserve carefully, because these dispositions can affect how much inventory is allocated to orders created outside of SIM. Customer Order Reserve is normally updated through customer orders generated in external systems. If you made adjustments to Customer Order Reserve in SIM, there could be inventory imbalances when the orders generated in external systems are fulfilled.

To and from Sub-bucket - Sub-buckets – Allows you to segregate the unavailable inventory bucket into various slots for specific reasons. Sub-buckets will be configurable, so that you can choose whether or not to use them.

The To Sub-Bucket is the destination and From Sub-Bucket is the source of the transfer, for example, move stock from the Display Window sub-bucket to the damaged sub-bucket.

System – Select this check box if this inventory adjustment reason code is system required. A system required reason code cannot be edited or deleted through the SIM user interface. After you save the new reason code, you cannot change it.

Publish – Select this box if you want all inventory adjustments associated with the reason code to be published to external system. If you do not want the adjustments to be published, do not select this check box.

3. Click **Save** to save the new reason code.

Your new reason code is added to the list. (Reason codes in the list are sorted by their Code values.)

Edit an Inventory Adjustment Reason Code

You can change some values for an existing inventory adjustment reason code that is not specified as system required.

Note: You cannot change any values an inventory adjustment reason specified as system required, and you cannot delete system required reason codes.

Navigate: Main Menu > Admin > Setup > Inv. Adj. Reason. The Inventory Adjustment Reason Maintenance window opens.

To edit an existing inventory adjustment reason, follow these steps:

1. Locate the row of the reason code you want to edit.
2. Double-click in any of the following fields to change their values.

Description – Enter a description of the inventory adjustment reason code.

Use in UI – Select this check box if you want the reason code to be available in the SIM user interface for SIM users to select. If you do not want this reason code to be available to SIM users, do not select this check box.

Publish – Select this box if you want all inventory adjustments associated with the reason code to be published to external system. If you do not want the adjustments to be published, do not select this check box.

Note: Reason codes will be available in the filter screen, even if the Use in UI indicator is not checked. This is to ensure a user can filter and find the adjustments the internal or external system made as well as find historical records.

3. Click **Save** to return to the Setup menu.

For more information about these fields, see "[Add an Inventory Adjustment Reason Code](#)."

Delete Inventory Adjustment Reason Codes

Note: You cannot change or delete an inventory adjustment reason code specified as system required. You cannot delete an inventory adjustment reason code that is currently in use.

Navigate: Main Menu > Admin > Setup > Inv. Adj. Reason. The Inventory Adjustment Reason window opens.

To delete inventory adjustment reason codes, follow these steps:

1. Select the reason codes you want to delete.
2. Click **Delete**. A message is displayed: "The selected line item(s) will be deleted. Do you want to continue?"
3. Click **Yes** to delete the codes.
4. Click **Save** to return to the Setup menu.

Shipment Reason Maintenance

You can add, change, and delete reason codes used for shipments. In addition to showing the reasons for shipments, reason codes also specify how shipments affect stock on hand, unavailable inventory, or customer order reserve inventory.

Navigate: Main Menu > Admin > Setup > Shipment Reasons. The Shipment Reason Maintenance window opens.

Figure 8–8 Shipment Reason Maintenance Window

Type	Code	Description	Inventory Status	Sub-bucket	System
Store	D	Damaged	Unavailable	Broken	<input type="checkbox"/>
Warehouse	D	Damaged	Unavailable	Broken	<input type="checkbox"/>
Finisher	D	Damaged	Unavailable	Broken	<input type="checkbox"/>
Finisher	F	Externally Initiated	Available		<input checked="" type="checkbox"/>
Store	O	Overstock	Available		<input type="checkbox"/>
Supplier	O	Overstock	Available		<input type="checkbox"/>
Warehouse	O	Overstock	Available		<input type="checkbox"/>
Finisher	O	Overstock	Available		<input type="checkbox"/>
Finisher	R	Repair	Unavailable	Trouble	<input type="checkbox"/>
Store	U	Unavailable Inventory	Unavailable	Trouble	<input checked="" type="checkbox"/>
Supplier	U	Unavailable Inventory	Unavailable	Trouble	<input checked="" type="checkbox"/>
Warehouse	U	Unavailable Inventory	Unavailable	Trouble	<input checked="" type="checkbox"/>
Finisher	U	Unavailable Inventory	Unavailable	Trouble	<input checked="" type="checkbox"/>
Supplier	W	Externally Initiated	Available		<input checked="" type="checkbox"/>
Warehouse	W	Externally Initiated	Available		<input checked="" type="checkbox"/>

Add a Shipment Reason Code

Use this procedure to add a shipment reason code.

Navigate: Main Menu > Admin > Setup > Shipment Reasons. The Shipment Reason Maintenance window opens.

To add a return reason, follow these steps:

1. Click **Add**. A new blank row is inserted at the end of the list of shipment reasons.
2. Complete the fields for the new shipment reason as follows.

Note: The Code and Description values for the reason code must match the values used in the Oracle Retail Merchandising System (RMS).

- **Type** – Select a type from the drop-down list. Values include: Supplier, Warehouse, Finisher, and Store.
- **Code** – Enter a new unique identifier of the shipment reason. If you enter a duplicate value, an error message is displayed.
- **Description** – Enter a description of the shipment reason code.
- **Inventory Status** – Determines if the type is available or unavailable in the inventory.

- **Sub-bucket** – Allows you to segregate the unavailable inventory bucket into various slots for specific reasons. Sub-buckets will be configurable, so that you can choose whether or not to use them.
- 3. Click **Save** to save the new reason code. Your new reason code is added to the list. (Reason codes in the list are sorted by their Code values.)

Edit a Shipment Reason Code

You can change some values for an existing Shipment reason code that is not specified as system required.

Note: You cannot change any values a shipment reason specified as system required, and you cannot delete system required reason codes.

Navigate: Main Menu > Admin > Setup > Shipment Reasons. The Shipment Reason Maintenance window opens.

To edit an existing shipment reason, follow these steps:

1. Enter a description of the Shipment reason code.
2. Click **Save** to return to the Setup windows.

For more information about these fields, see "[Add an Inventory Adjustment Reason Code.](#)"

Delete Shipment Reason Codes

Note: You cannot change or delete a shipment reason code specified as system required. You cannot delete a shipment reason code that is currently in use.

Navigate: Main Menu > Admin > Setup > Shipment Reason. The Shipment Reason Maintenance window opens.

To delete shipment reason codes, follow these steps:

1. Select the reason codes you want to delete.
2. Click **Delete**. A message is displayed: "The selected line item(s) will be deleted. Do you want to continue?"
3. Click **Yes** to delete the codes.
4. Click **Save** to return to the Setup menu.

Tolerances

SIM allows the setup of tolerances for ad hoc (unplanned) stock counts and customer order picking.

Note: Only a system administrator or other user with the necessary security permissions can set ad hoc stock count or customer order picking variances.

A specific variance can be set for each item class. (By default, allowable variances for all item classes for ad hoc stock counts are set at zero.) The allowable variance can be set to either one of the following types:

- Variance percent

The variance can be set as a percentage variance between the counted stock and the SIM stock inventory level, based on the standard unit of measure for each item. If an item count varies from the SIM inventory level by this percentage or more, the item count is discrepant.

For example, if the variance is set at 3 percent, an item count variance of less than 3 percent (plus or minus) is allowable, but an item count of 3 percent or greater variance is discrepant.

- Variance number of units

The allowable variance can be set as an amount variance between the counted stock and the SIM stock inventory level, based on the standard unit of measure for each item. If an item count varies from the SIM inventory level by this number of standard units of measure or more, the item count is discrepant.

For example, if the variance is set at 10 standard units of measure, an item count variance of fewer than 10 units (plus or minus) is allowable, but an item count that varies by 10 units or more is discrepant.

Customer Order Picking Tolerances

These tolerances are for customer order picking (by default, allowable variances for all item classes are set at zero) for customer orders. The tolerances are used to define how much over the order amount a user can pick for an item that is not an Each item:

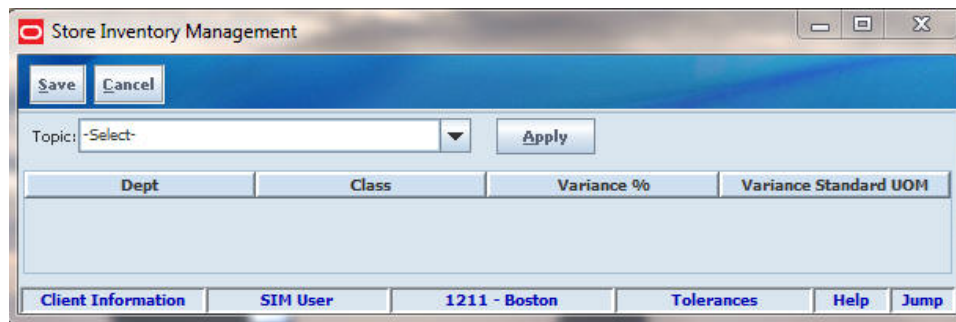
- **Variance %** – The percent threshold for a class to determine how much the order quantity can be exceeded in picking.
- **Variance Standard UOM** – The unit threshold for an item to determine how much the order quantity can be exceeded in picking.

Both unit and percentage variances will be applied and need to be valid for the user to not be restricted.

Set Tolerances for Ad Hoc Stock Counts and Customer Order Picking

Navigate: Main Menu > Admin > Setup > Tolerances. The Tolerances window opens.

Figure 8–9 Tolerances Window



To set variances for item classes, follow these steps:

1. Select a Topic from the drop down list.
2. Click **Apply**.
3. Select the row with the item class you want to set or change.
4. Enter an integer (whole number) value in one of the following fields:
 - Variance %** – Enter the threshold percentage of variance, based on the standard unit of measure for each item in the class.
 - Variance Standard UOM** – Enter the threshold number of units of variance, based on the standard unit of measure for each item in the class.

To enter a value, follow these steps:

 - a. Double-click in the field.
 - b. Enter the value.
 - c. Press **Enter**.
5. Repeat Steps 2 and 3 as needed to set variances for other item classes.
6. Click **Save** to return to the Setup menu.

Extended Attributes Setup

This screen is used to manage extended attributes that capture additional information about an item, including the global international standard which defined a specific type of data that may exist in a scannable barcode.

Navigate: Main Menu > Admin > Setup > Ext Attributes. The Extended Attributes window opens.

Figure 8–10 *Extended Attributes Window*



Attributes Setup

The Setup Attributes window contains the following fields:

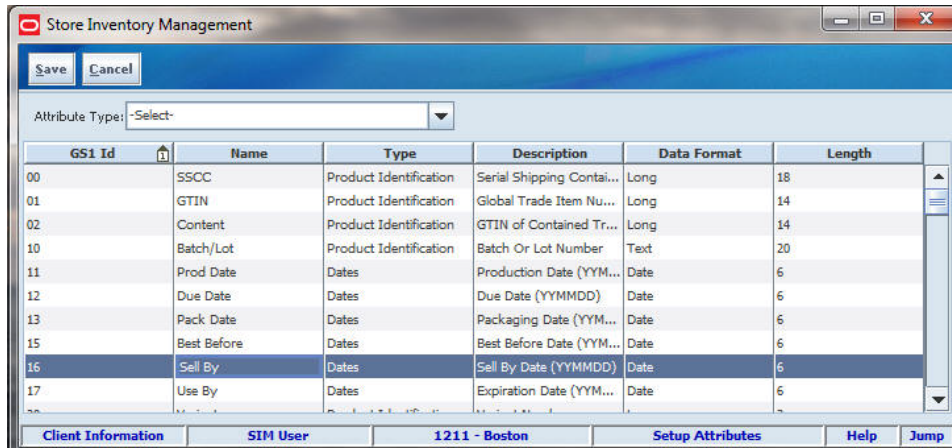
Field	Description
Attribute Type	A filter used to group the attributes in order to display specific types of attributes.
GS1 ID	A unique ID defined by the global international standard which defines a specific type of data that may exist in a scannable barcode.

Field	Description
Name	Name for the extended attribute which describes the purpose of the attribute.
Type	Groups the attributes for purposes of filtering on the setup screen and other areas where extended attributes are assigned or data entered.
Description	Describes the purpose of the extended attribute.
Data Format	Defines the values in the configuration record.
Length	Length of the field and determines how many characters to display or allow the user to enter.

To setup attributes:

1. Click **Setup Attributes**. The Setup Attributes window opens.

Figure 8-11 Setup Attributes Window



2. Select the Attribute Type. The dialog box populates with your selection.
3. Click **Save** to return to the Extended Attributes menu.

Assign Attributes

The Assign Attributes window contains the following fields:

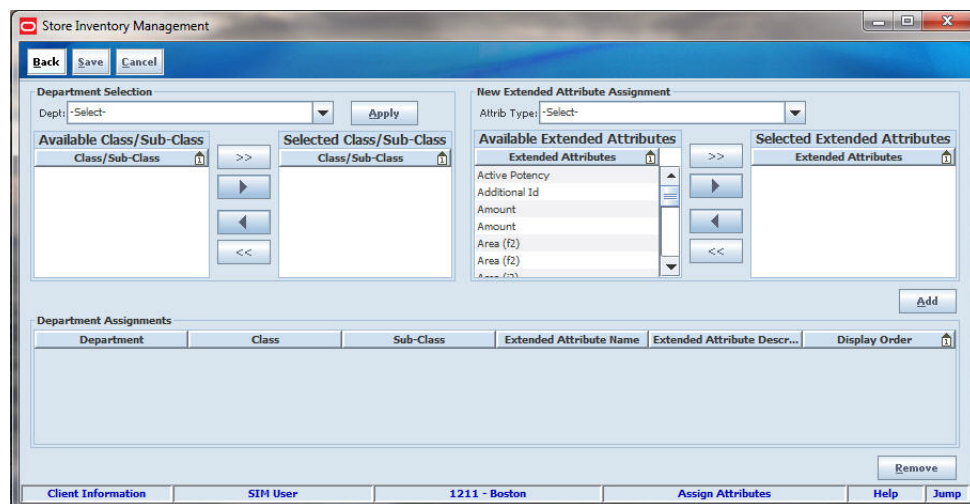
Field	Description
Department Selector	Pre-defined list of departments from the merchandise hierarchy used to assign the extended attributes.
Attrib Type Selector	Pre-defined list of types of attributes loaded using a data seeding script.
Available Class/Sub-Class	Pre-defined list of Class/Sub-Class combinations from the merchandise hierarchy available to select for extended attribute assignment.
Selected Class/Sub-Class	Pre-defined list of Class/Sub-Class combinations from the merchandise hierarchy selected for extended attribute assignment.
Available Extended Attributes	Pre-defined list of GS1 data elements based on GS1 General Specification standards used as extended attributes and all are available for department assignment.

Field	Description
Selected Extended Attributes	Custom pre-defined list of extended attributes selected for department assignment.
Department	Pre-defined list of departments from the merchandise hierarchy assigned to the extended attributes.
Class	Pre-defined list of Class/Sub-Class combinations from the merchandise hierarchy available to select for extended attribute assignment.
Sub-Class	Pre-defined list of Class/Sub-Class combinations from the merchandise hierarchy available to select for extended attribute assignment.
Extended Attribute Name	Custom pre-defined list of extended attributes available for department assignment.
Extended Attribute Description	Custom pre-defined list of extended attributes available for department assignment.
Display Order	Used to define the order the fields should appear on the data entry screen.

To assign the extended attributes to a department/class/sub-class and identify the order they are displayed:

1. Click **Assign to Dept.** The Assign Attributes window opens.

Figure 8–12 Assign Attributes Window



2. Select the Department.
3. Click **Apply**.
4. Move items from the Available Class/Sub-Class to the Selected Class/Sub-Class, or visa versa, by either double-clicking the selection or using the arrow button.
5. Select an Attribute Type from the New Extended Attribute Assignment box.
6. Move items from the Available Extended Attributes to the Selected Extended Attributes, or visa versa, by either double-clicking the selection or using the arrow button.
7. Click **Add**. The Department Assignments box is populated.

8. Click **Save** to save your assignments.

Print Setup

The Print functions allow administrators or other authorized personnel to add, change, or remove printers used for SIM reports, tags, and labels.

Note: Only users with the required permissions can set up printers.

Navigate: Main Menu > Admin > Print Setup. The Print Setup window opens.

Figure 8–13 *Print Setup Window*



From the Printer Setup window, you can do the following:

- [Add a Format](#)
- [Change a Format](#)
- [Delete a Format](#)
- [UDA Print Setup](#)
- [Add a Printer](#)
- [Change Printer Properties](#)
- [Delete a Printer](#)
- [Add a Hierarchy Format Assignment](#)
- [Change a Hierarchy Format Assignment](#)
- [Delete a Hierarchy Format Assignment](#)

From the Printer Setup window, click **Back** to return to the Print Setup menu.

Change Printer Properties

You can change the properties of a configured printer. This might be needed if the network address of a printer changes, or if you want to change the description or type of the printer. (You can also delete the printer and add it again.)

To change the properties of a configured printer, follow these steps:

1. Select the printer from the list.

2. Change the printer properties as required. See “[Add a Printer](#)” for information about the required fields.
3. Click **Save** to save the changes and return to the Setup menu.

Delete a Printer

Note: You cannot delete a printer that is used as a SIM default printer.

To delete a printer, follow these steps:

1. Select the printer from the list.
2. Click **Delete**.
You receive a prompt to confirm that you want to delete the printer.
3. Click **Yes** to delete the printer and return to the Setup menu.

Print Formats

Formats apply to the following SIM report types (outputs):

- Child Stock Count List
- Customer Order
- Customer Order Bin Labels
- Customer Order Delivery BOL
- Customer Order Delivery
- Customer Order Pick Detail
- Customer Order Pick Discrepancy
- Customer Order Reverse Pick
- Direct Store Delivery Discrepant
- Direct Store Delivery
- Inventory Adjustment
- Item
- Item Basket
- Item Request
- Manifest
- Pre-Shipment
- RTV Shipment Bill of Lading
- RTV Shipment
- RTV Shipment Container
- Shelf Adjustment
- Shelf Replenishment
- Stock Count Detail

- Stock Count Export
- Stock Count Rejected Item
- Store Order
- Transfer
- Transfer Bill of Lading
- Transfer Delivery
- Transfer Delivery Exception
- Transfer Shipment
- Transfer Shipment Bill of Lading
- Transfer Shipment Container

For each of these outputs, a default format is defined. SIM supports multiple formats for any of these outputs. All formats can be customized at the store level.

Formats are set up in the output tools or devices used to produce them. An output tool could be a printer or a software tool such as Oracle Business Intelligence Publisher. The Formats window is the interface to add output formats to SIM and specify the output devices or locations.

Formats apply to the following SIM ticketing types:

- Auto Generate SN
- Item Ticket
- Shelf Label

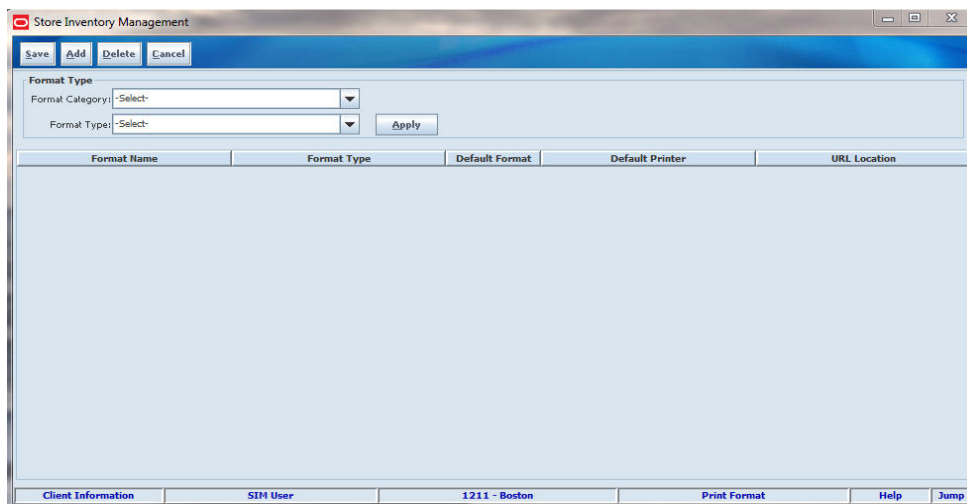
Formats apply to the following SIM Shipping Format types:

- RTV Shipping Label
- Transfer Shipping Label

For more information about SIM formats and reports, see the *Oracle Retail Store Inventory Management Implementation Guide*.

Add a Format

Navigate: Main Menu > Admin > Print Setup > Print Format. The Print Format window opens.

Figure 8–14 *Formats Window*

To add a format, follow these steps:

1. If you want to filter the Formats table, select a format category and format type from the **Formats Type** section.
2. Click **Apply**. The formats are populated.
3. Click **Add**. A line is added to the bottom of the Formats table.
4. Complete the fields that define the format, as follows:
 - Format Name** – Enter a unique name for the format.
 - Format Type** – Select the output type from the drop-down list.
 - Default Format** – Select the check box if this is the default format for the output type. Only one format for each Type can be the default.
 - Default Printer** – Select the printer name from the drop-down list.
 - URL Location** – Enter the network path of the output device.
5. Click **Save** to save your changes and return to the Print Setup menu.

Change a Format

Navigate: Main Menu > Admin > Print Setup > Print Format. The Print Format window opens.

To add one or more formats, follow these steps:

1. If you want to filter the Formats table, select a format category and format type from the **Formats Type** section.
2. Click **Apply**. The formats are populated.
3. Double-click the format you want to change.
4. Enter the updated information for Format Name, Default Printer, URL Location, and Default Format, if applicable.
5. Click **Save** to return to the Print Setup menu.

Delete a Format

Navigate: Main Menu > Admin > Print Setup > Print Format. The Print Format window opens.

To delete one or more formats, follow these steps:

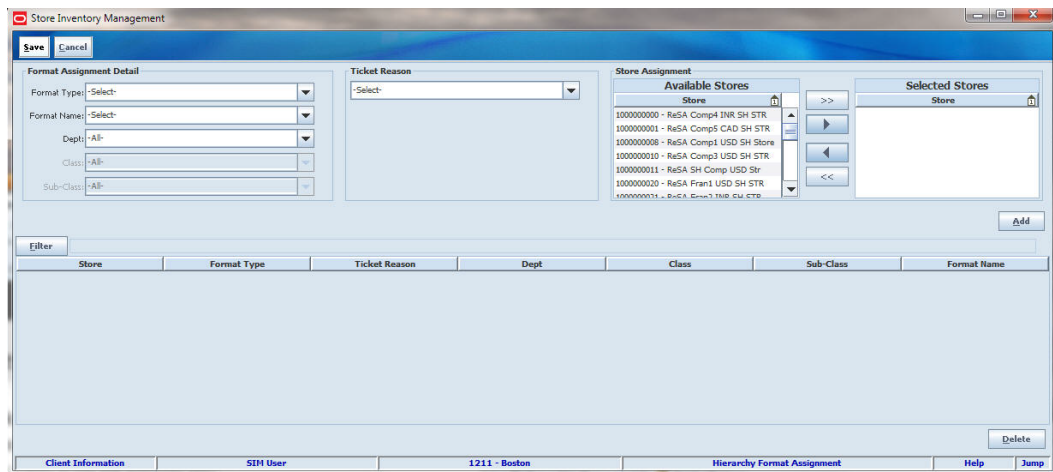
1. If you want to filter the Formats table, select a format category and format type from the **Formats Type** section.
2. Click **Apply**. The formats are populated.
3. Select the formats you want to delete.
4. Click **Delete**. A message is displayed: "Are you sure you want to delete the selected report type formats?"
5. Click **Yes** to delete the formats.
6. Click **Save** to return to the Print Setup menu.

Hierarchy Format

This screen is used to assign the ticket formats based on the event and ticket type. Formats can be assigned at department/class or sub class level and can also assign it for multiple stores.

Navigate: Main Menu > Admin > Print Setup > Hierarchy Format. The Hierarchy Format Assignment window opens.

Figure 8–15 Hierarchy Format Assignment Window



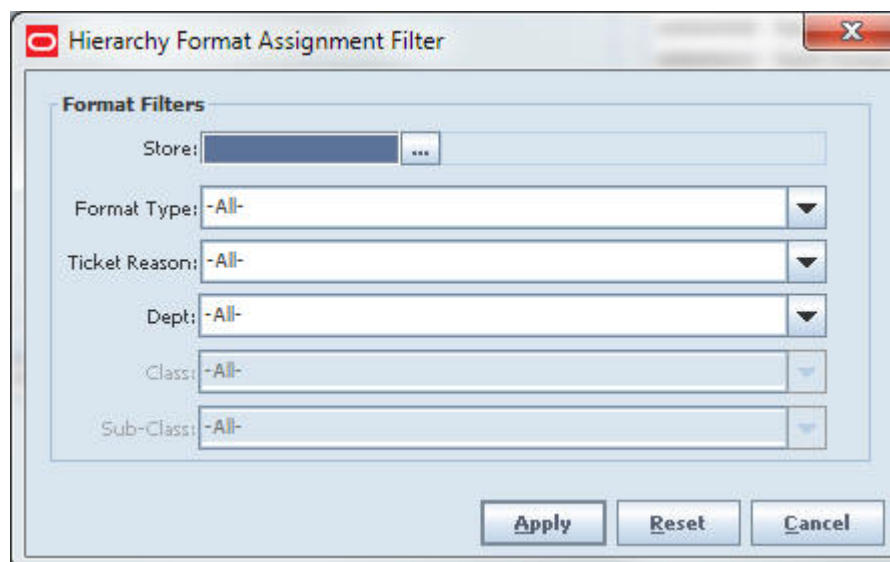
1. Select a **Format Type** from the drop down list.

Note: Auto Generated SN is not included as a type since the purpose of the screen is to handle price changes and AGSN tickets are not generated for a price change event.

2. Select a **Format Name** from the drop down list.
3. Select a **Department** from the drop down list.
4. Select a **Class** from the drop down list.

5. Select a **Sub-Class** from the drop down list.
6. Select a **Ticket Reason** which indicates the different price events. There are three ticket reasons to select from: Regular Price Change, Promotion, Clearance.
7. Choose selected stores assignment from the list of available stores.
8. Click the arrow button to move the stores to the Selected Stores.
9. Click **Add** to add the selected details to the fields list.
10. Click **Filter** at any time to populate the screen with items that match the search criteria. The Hierarchy Format Filter window opens.

Figure 8–16 Hierarchy Format Filter Window



- a. Enter **Store**.
 - b. Select **Format Type** from the drop down list.
 - c. Select **Ticket Reason** from the drop down list.
 - d. Select **Department** from the drop down list.
 - e. Select **Class** from the drop down list.
 - f. Select **Sub-Class** from the drop down list.
 - g. Click **Apply**. The transactions matching the search criteria are listed in the Hierarchy Format Assignment window.
11. Click **Save** to save your changes and return to the Print Setup window.

Add a Hierarchy Format Assignment

To add a hierarchy format assignment, follow these steps:

Follow Steps 1-9 above.

1. A warning message displays, "Format is already assigned for the selected combination and it will be overridden."
2. Select **OK**.
3. Click **Save** to save your changes and return to the Print Setup window.

Change a Hierarchy Format Assignment

In order to change the hierarchy format assignment, delete the format assignment, and then add the new format assignment.

Delete a Hierarchy Format Assignment

To delete the hierarchy format assignment, follow the steps:

Navigate: Main Menu > Admin > Print Setup > Hierarchy Format. The Hierarchy Format Assignment window opens.

1. Click **Filter** at any time to populate the screen with items that match the search criteria. The Hierarchy Format Assignment Filter window opens.

Figure 8–17 Hierarchy Format Assignment Filter Window

- a. Enter **Store**.
 - b. Select **Format Type** from the drop down list.
 - c. Select **Ticket Reason** from the drop down list.
 - d. Select **Department** from the drop down list.
 - e. Select **Class** from the drop down list.
 - f. Select **Sub-Class** from the drop down list.
 - g. Click **Apply**. The transactions matching the search criteria are listed in the Hierarchy Format Assignment window.
2. Click **Apply**. The Hierarchy Format Assignment window populates with the store.
 3. Select one or more stores to delete.
 4. Click **Delete**.
 5. A Hierarchy Formats Delete Confirmation window displays. Click **Yes**.
 6. Click **Save** to save your changes and return to the Print Setup window.

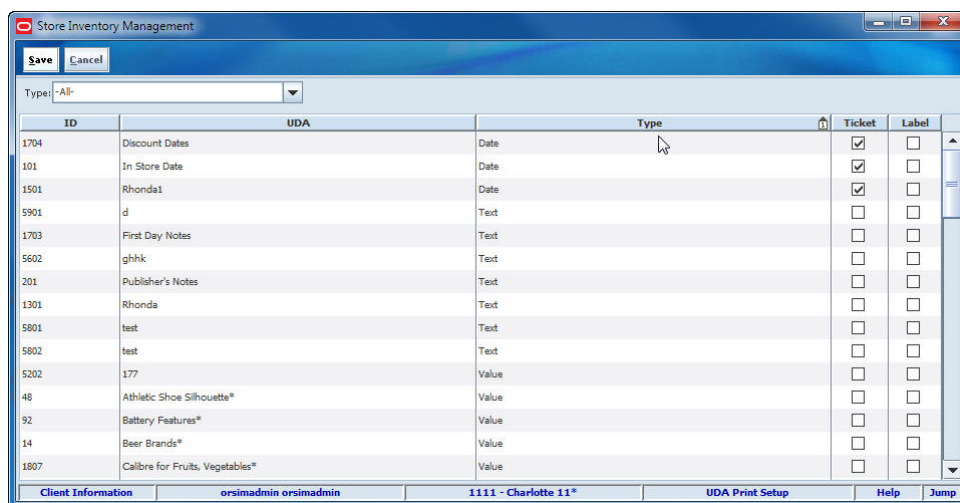
UDA Print Setup

SIM can automatically generate tickets and labels for items when user-defined attribute (UDA) values change. The UDA Print Setup function allows you to define whether new tickets or labels, or both, should be printed automatically when particular UDA values change.

Note: These print settings affect all stores, because user-defined attributes are not specific to stores. This function is only available to users with the required SIM permissions.

Navigate: Main Menu > Admin > Print Setup > UDA Print Setup. The UDA Print Setup window opens.

Figure 8–18 UDA Print Setup Window



Select the UDAs to List

Select a value from the **Type** drop-down list to select which UDAs to display in the list:

- **All** – Display all UDAs of all types (default).
- **Date** – Display only UDAs for which the values are dates.
- **Text** – Display only UDAs for which the values are free-form text.
- **Value** – Display only UDAs for which the values are specific values from a list.

Specify Whether Tickets or Labels Are Printed Automatically

To control whether tickets or labels are printed automatically when a UDA changes, follow these steps:

1. For each UDA for which you want to turn ticket or label printing on or off, follow these steps:
 - a. Locate the UDA in the UDA Print Setup list.
 - b. To specify automatic printing of item tickets when this UDA changes, select (check) the **Ticket** check box for the UDA.

To turn off automatic ticket printing for this UDA, deselect (clear) the Ticket check box.

- c. To specify automatic printing of shelf labels when this UDA changes, select (check) the **Label** check box for the UDA.

To turn off automatic label printing for this UDA, deselect (clear) the Label check box.

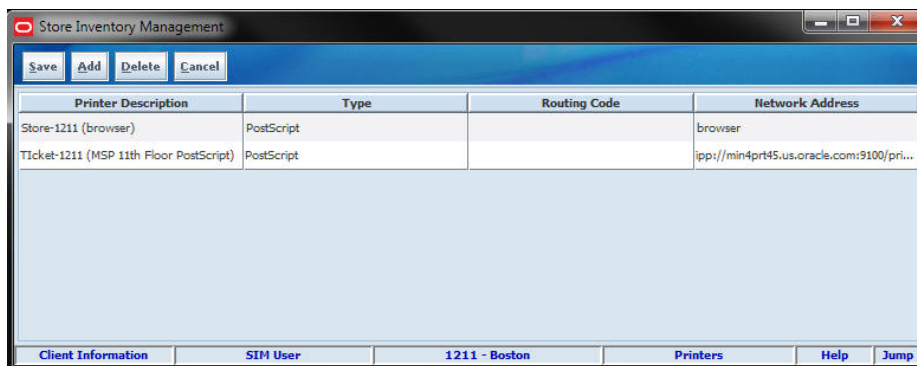
2. Click **Save** to return to the Print Setup menu.

Add a Printer

To add a new SIM printer, follow these steps:

Navigate: Main Menu > Admin > Print Setup > Printers. The Print Setup window opens.

Figure 8–19 Printers Window



1. Click **Add**.
2. Complete the following required fields for the new printer:
 - Printer Description** – Enter a description by which you can identify the printer within your organization.
 - Type** – Select the type of printer.
 - Routing Code** – Enter the code for the method to route a ticket, label, or report.
 - Network Address** – Enter the IP address of the printer.
3. Click **Save** to add the printer and return to the Print Setup menu.

DSD Receiving

A Direct Store Delivery (DSD) is a delivery in which the supplier delivers the products directly at the store. Deliveries from the supplier include the following:

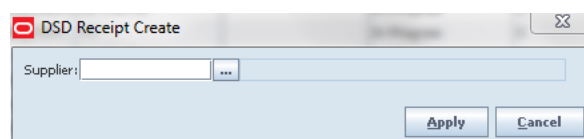
- DSD Receiving with a PO and an ASN
- DSD Receiving with a PO, but no ASN
- DSD Receiving on the fly (no PO or ASN)
- DSD Receiving Dex/Nex (no PO, but delivery document)

How to Create a Receipt without a PO and an ASN

Navigate: Main Menu > Shipping/Receiving > DSD Receiving. The DSD Receiving List window opens. Click **Create Receipt**.

When you select **Create Receipt**, the DSD Receipt Create pop up window opens for you to enter the supplier ID, or click the [Ellipsis](#) button to open the Supplier Lookup window and select the supplier.

Figure 9–1 DSD Receipt Create Window



After you click **Apply**, it takes you to the DSD Receiving Detail window to create new containers and do detailed item level receiving. Refer to the DSD Receiving Detail window. See [Figure 9–6](#).

How to Access and Receive Deliveries that are with ASN or Dex/Nex

Navigate: Main Menu > Shipping/Receiving > DSD Receiving. The DSD Receiving List window opens.

The deliveries that have come into a store through ASN or Dex/Nex are listed on the DSD Receiving List window with the active status. You can double click the delivery record and go to the DSD Receiving Detail window which lists all the containers to process.

How to Create a Receipt with a PO and no ASN

Navigate: Main Menu > Shipping/Receiving > Purchase Order. The Purchase Order List window opens.

The Purchase Order List shows all the Active Purchase Orders. To create a receipt against an approved PO, select the PO and double click or press Enter to go to the Purchase Order Detail window. Select **Create Receipt** to create the receipt for the selected Purchase Order.

Figure 9–2 Purchase Order List Window

ID	Supplier	Create Date	Status	Customer Order
681	2400 - Coca Cola - Charlotte	9/24/2015	In Progress	
701	2600 - Coca Cola - Los Angeles	9/29/2015	In Progress	
703	2600 - Coca Cola - Los Angeles	9/29/2015	In Progress	
721	2400 - Coca Cola - Charlotte	9/29/2015	In Progress	
7884602	6200 - Local Grocery Supplier #3	8/5/2015	Approved	
7884603	6200 - Local Grocery Supplier #3	8/5/2015	Approved	
7884604	6200 - Local Grocery Supplier #3	8/5/2015	Approved	
7884608	6200 - Local Grocery Supplier #3	9/11/2015	Approved	
7884622	6200 - Local Grocery Supplier #3	9/11/2015	Approved	
7884623	6200 - Local Grocery Supplier #3	9/11/2015	Approved	
7884624	6200 - Local Grocery Supplier #3	9/11/2015	Approved	
94715	2400 - Coca Cola - Charlotte	8/5/2015	Approved	
94716	2400 - Coca Cola - Charlotte	8/5/2015	Approved	
94725	2400 - Coca Cola - Charlotte	9/11/2015	Approved	
94801	2400 - Coca Cola - Charlotte	8/5/2015	Approved	
95301	2400 - Coca Cola - Charlotte	9/11/2015	Approved	
96309	6200 - Local Grocery Supplier #3	9/11/2015	Approved	
96310	6200 - Local Grocery Supplier #3	9/11/2015	Approved	
97803	6200 - Local Grocery Supplier #3	9/11/2015	Approved	
p76767	2500 - Coca Cola - Chicago	9/23/2015	Approved	✓
p767673	2500 - Coca Cola - Chicago	9/23/2015	Approved	

1. Select a purchase order ID. The Purchase Order Detail window opens.

Figure 9–3 Purchase Order Detail Window

Item	Item Description	Primary VPI	UOM	Pack Size	On Order	Expected	Received	Unit Cost
11300055	T1 (F)		Units	1	10	10	0	\$9.99

2. Click **Create Receipt**. The DSD Receiving Detail window opens. See [Figure 9–6](#).

Figure 9–4 DSD Receiving List Window

ID	ASN	Supplier	Type	Expected Date	Status	Containers	Missing	Total SKUs	Customer Order
181		2400 - Coca Cola -...	PO		In Progress	1		1	
241		1800 - Refurbishm...	On The Fly		In Progress	1		0	
361		2400 - Coca Cola -...	PO		In Progress	0		0	
362		2400 - Coca Cola -...	PO		In Progress	1		0	
501		2500 - Coca Cola -...	PO		In Progress	1		0	✓
504		2400 - Coca Cola -...	PO		In Progress	1		0	
505		2500 - Coca Cola -...	PO		In Progress	1		1	✓
506		2500 - Coca Cola -...	PO		In Progress	1		1	
522		2400 - Coca Cola -...	PO		In Progress	0		0	
523		2400 - Coca Cola -...	PO		In Progress	0		0	
524		2400 - Coca Cola -...	PO		In Progress	0		0	
525		2400 - Coca Cola -...	PO		In Progress	0		0	
526		2400 - Coca Cola -...	On The Fly		In Progress	0		0	
401		2400 - Coca Cola -...	PO		In Progress	0		0	
141		2400 - Coca Cola -...	On The Fly		In Progress	1		0	
161		2400 - Coca Cola -...	PO		In Progress	0		0	
221		2400 - Coca Cola -...	PO		In Progress	0		0	
222		2400 - Coca Cola -...	PO		In Progress	0		0	
421		6200 - Local Groce...	PO		In Progress	0		0	
422		2400 - Coca Cola -...	On The Fly		In Progress	0		0	
441		2500 - Coca Cola -...	On The Fly		In Progress	1		0	

The DSD Receiving List shows all the active deliveries for you to do the detailed receiving. It includes all types of deliveries. If your supplier has sent an ASN or a Dex/Nex file is uploaded, it is listed here with New status. You can select those deliveries and do the detailed receiving. If you have started the delivery process, it shows the delivery with the In Progress status. You can select the in progress deliveries to continue the receiving.

You can also select the completed deliveries to do the adjustment.

From the DSD Receiving List window, you can do the following:

- Use the **Filter** button to filter the list based on the given criteria.
- Select **Create Receipt** to create a delivery without any PO (on the fly).
- Select the delivery from the list and do detailed receiving or edit the delivery.
- Select one or more deliveries and print a report.

Filter the DSD Receiving List Window

By default when you open the DSD Receiving List, it displays all the active deliveries.

At any time while the DSD Receiving List window is open, you can click **Filter** to select filter criteria and filter the deliveries.

Current filtering is displayed next to the Filter button on the DSD Receiving List window. If no filtering is displayed, all items are currently selected and listed.

Filter Status = In Progress

To change how the list is filtered:

1. Click **Filter**. The DSD Receiving List Filter window opens.

Figure 9-5 DSD Receiving List Filter Window

2. If you want to reset all filtering criteria to default values, click **Reset**.
3. Enter or select filtering criteria as needed to select just the deliveries you want to list. All criteria are optional. If you leave a field blank or select All, all values will be included in your filtering selection.

Date Filters – Enter or select dates to select only those purchase orders created between a From Date and To Date that you specify.

Purchase Order – Enter the purchase order number to select only a specific purchase order.

Originating Type – Select a type from the drop-down list.

Invoice Number – Enter the invoice number to select only a specific invoice order.

ASN – Enter the ASN to select only a specific delivery.

Item – Enter the Item ID or click the **Ellipsis** button to look up an item.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Transfer List Filter window. See “[Item Lookup](#)” in [Chapter 20](#) for more information.

Customer Order ID – Enter a customer order ID to select only a specific customer order.

Fulfillment Order ID – Enter a fulfillment order ID to select only a specific fulfillment order.

Customer Orders – Select this check box to include only customer orders.

Supplier – Enter the supplier ID or click the **Ellipsis** button to look up the supplier.

In the Supplier Lookup window, enter search criteria as needed to find the supplier you want. (See “[Supplier Lookup](#)” for more information about supplier lookup criteria.) Select the item you want and click **Apply** to return to the Delivery List Filter window.

Status – Select a status from the drop-down list. The default is Active.

- User** – Select a user from the drop-down list.
- Click **Apply**. Results that match your search criteria are displayed in the DSD Receiving List window. If you want to change the search criteria, click **Filter** to search again.
 - Select an item by double-clicking it to open the container details or create new containers. The DSD Receiving Detail window opens.

Figure 9–6 DSD Receiving Detail Window

You see the DSD Receiving Detail window for all type of deliveries. If you are receiving a delivery with ASN or Dex/Nex type of delivery, it shows the containers with its details. You have to select the container and double click to go to the DSD Receiving Container Detail window to do the detailed item level receiving. You can also create a new container using the **Create Container** option which takes you to the DSD Receiving Container Detail window to receive unexpected containers.

This screen shows zero containers in case you are creating a new receipt without a PO or with a PO and no ASN. Click **Create Container** to start the receiving process.

Note: You cannot create new containers for Dex/Nex type of delivery.

Header fields are as follows:

Field	Description
ID	Unique ID created by SIM.
ASN	ASN number of the delivery.
Supplier	The supplier from whom you are receiving this delivery.
Purchase Order	The purchase order number generated by SIM, or the purchase order number provided by an external system.
Status	The status of the delivery/receipt.
Expected Date	Estimated time of arrival.
Received Date	The date the receipt is first created.
Received User	The SIM user who received the delivery.

Field	Description
Total Container SKUs	The sum of container level unique items in the delivery.
Containers	Total number of containers in the delivery.
Documents	Total number of purchase orders associated with this delivery.

Details fields are as follows:

Field	Description
Container ID	Unique ID created by SIM or container ID that came in the ASN from the external vendor system.
Status	Current status of the container.
Number of SKUs	Number of SKUs present in the container.
Number of Docs	Total number of purchase orders associated with this container.
Customer Order	Indicates whether a customer order exists.
UIN Required	Indicates whether UIN required items are present in this delivery.

- To enter the invoice and carrier information, click **Info**. The Receiving Info window opens.

Figure 9–7 Receiving Info Window

The screenshot shows a window titled "Receiving Info" with a close button (X) in the top right corner. The window is divided into several sections:

- Delivery Information:**
 - Delivery ID: 603
 - ASN:
 - Supplier: 2400 Coca Cola - Charlotte
 - Status: In Progress
 - Containers: 0
- Expected Date:**
 - Create Date: 10/1/2015
 - Create User: SIM_User
 - Update Date: 10/1/2015
 - Update User: SIM_User
 - Received Date:
 - Received User:
- Invoice Information:**
 - Invoice Number:
 - Invoice Date:
 - Invoice Cost:
- Carrier Information:**
 - Carrier Entity:
 - Carrier Type: Corporate
 - Carrier Code:
 - License Plate:
 - From Address:
 - Freight ID:

At the bottom right of the window, there are two buttons: "Save" and "Cancel".

Complete the fields that are enabled and then click **Save**. You return to the DSD Receiving Detail window.

- **Invoice Number** – Enter the invoice number for the delivery.
 - **Invoice Date** – Enter or select the date of the invoice.
 - **Invoice Cost** – Enter the total cost of the delivery.
 - **Carrier Entity** – Enter the name of the carrier.
 - **Carrier Type** – Select the carrier type from the drop-down list.
 - **Carrier Code** – This field is enabled based on the selection in the Carrier Type field. Enter the code for the carrier.
 - **License Plate** – Enter the license plate number of the carrier’s truck.
 - **From Address** – Enter the address from where the delivery came.
 - **Freight ID** – Enter the freight code.
7. To default the expected quantity to received quantity, click **Default Qty**.
- The default quantity button helps you to default the expected quantity to the received quantity in the containers that are new and in progress. The system does not default the quantities for the items that are processed earlier and contain a value including zero.
- Default Quantity sets the status of the integrated UINs to In Receiving for the delivery. In addition, a validation check is performed to ensure the quantity matches the serial numbers for items. If that is not the case, it is not allowed.
8. To confirm the delivery, click **Confirm Delivery**. This confirms the delivery. This moves all the containers to Received or Missing if the container does not have any received or damaged quantity.
9. To reject the delivery, click **Reject Delivery**. This rejects the delivery, moves all the containers to canceled status, and moves the status of the delivery to Rejected. This also removes any UINs present in the delivery. Rejection of a delivery is possible only for the deliveries that are in In Progress or New status. It does not allow the rejection if there are any received or damaged containers in the delivery.
10. To delete the delivery, click **Delete Delivery**. This cancels the delivery and all the containers inside the delivery.
11. To view customer orders associated to this delivery, click **Customer Orders**.
12. To view any external adjustment done by the external system for the delivery, click **Ext Adjustments**. To enter any notes to the delivery, click **Notes**. To print the delivery report, click **Print**.
13. To create a container, click **Create Container**. The DSD Receiving Container Detail window opens. If this delivery is for the existing ASN or Dex/Nex, the item details appear and you can do the detailed receiving on this screen. For on the fly and with PO and no ASN type, you can select the add/scan item option to add items to do the receiving.

Figure 9–8 DSD Receiving Container Detail Window - On the Fly

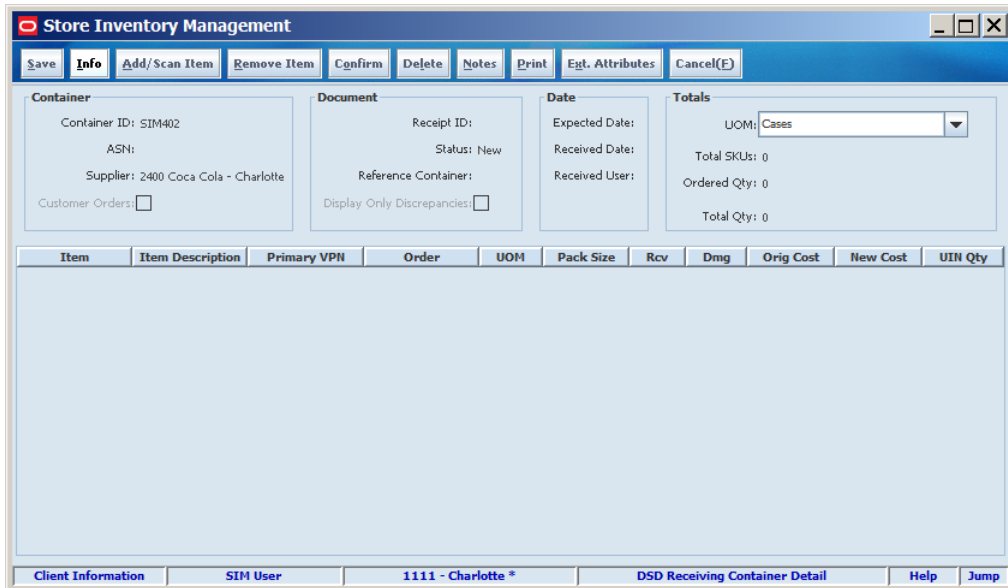
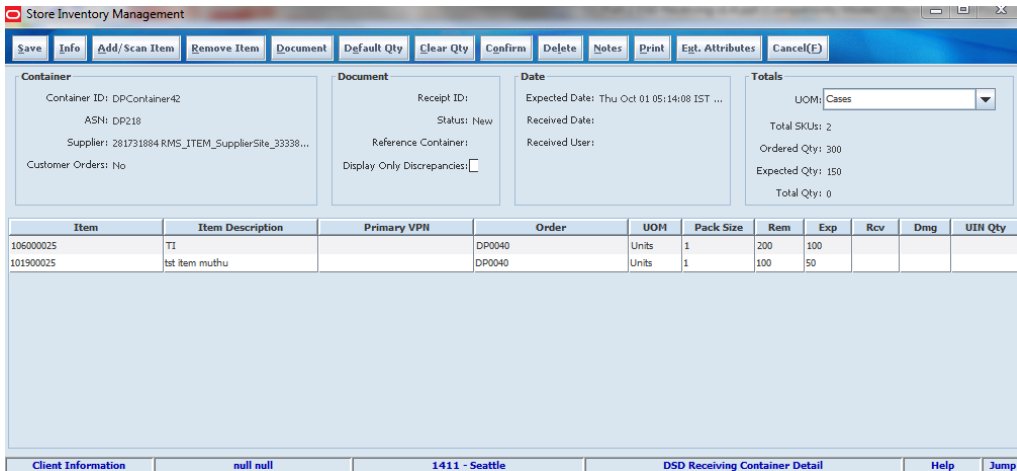


Figure 9–9 DSD Receiving Container Detail Window



- a. Click **Info**. The DSD Receiving Container Info window opens.

Figure 9–10 DSD Receiving Container Info Window

- b. Complete the fields that are enabled:

Reference Container – This field is used to identify a misdirected container.

Receive on Shop Floor – Indicates whether the delivery will be received on the shop floor instead of automatically receiving into the back room. This allows the user to Top off the shop floor first, depending upon how it is configured.

Damage Remaining – When this field is checked, the items in the container will be marked as damaged.

Damage Reason – Enter the reason for the damaged container.

SSCC – Enter the GS1 Barcode container ID.

Tracking ID – Enter the identifier assigned to a container when shipping. This can be used to track the location of the delivery.

- c. Click **Save**. You return to the DSD Receiving Container Detail window.

14. Complete the fields that are enabled in the table:

- **UOM** – Select Units or Cases.
- **Pack Size** – This field is disabled. It displays the pack size of the delivery.
- **On Order** – This field is disabled. It displays the remaining on-order quantity for the purchase order.
- **Expected** – This field is disabled. It displays how many cases were expected on the original ASN or remained on the purchase order that was applied. If SIM generated the purchase order, the value is zero.

Received – Enter the quantity of items that are being received, expressed in the designated unit of measure.

If this is an existing purchase order, select the merchandise that you want to receive. To receive all items, click **Receive All**. The quantities that were ordered are entered as the received quantities.

Note: This is only applicable for existing purchase orders.

Also, the cost cannot be edited if the delivery is against an ASN with PO or only PO. It can be only viewed based on the settings.

For items that require serial number type UINs, this field is disabled. You update the received quantity through the UIN window.

Default Qty sets the status of the integrated UINs to In Receiving for the delivery. In addition, a validation check is performed to ensure the expected quantity matches the serial numbers for items, if that is not the case, the user will not be allowed to receive all.

- **Damaged** – Enter the number of items that were damaged in the transfer.
- For items that require serial number type UINs, this field is disabled. You update the damaged quantity through the UIN window.
- **UIN Qty** – If an item requires serial number type unique identification numbers (UIN), this field displays the number of items for which UINs have been scanned or entered.

15. To add an item:

Note: This capability may not be enabled if you are receiving against a new purchase order.

- a. Click **Add/Scan Item**. See “[Scan an Item \(Scanner Button\)](#)” in [Chapter 2](#) for more information.
- b. The Advanced Item Entry window opens. Complete the fields that are enabled:
 - UOM** – From the drop-down list, select the appropriate unit of measure.
 - Pack Size** – If the displayed pack size is not correct, enter the correct pack size.
 - Expected** – Enter the quantity of expected delivery units.
 - Received Qty** – Enter the quantity of received delivery units.
 - Damaged Qty** – Enter the quantity of damaged delivery units.
 - UIN Qty** – Open the pop-up by double clicking it and mark UINs as required.
- c. Click **Confirm** to approve your changes.

16. Remove extra lines as follows:

- a. Select the line that you want to remove.
- b. Click **Remove Item**. The line is removed.

17. To enter any additional information, click **Notes**. The DSD Receiving Notes window opens. For each note, enter your information and click **Save**. When you have finishing entering notes, click **Apply**.

18. To view only the items that are having discrepancies, check the Display Only Discrepancies check box to filter and show only the items that are in discrepancy.

19. To modify the UOM at the header level, select the UOM from the header portion. This will change the UOM of the items when you add the item.

20. To clear the received quantity, click **Clear Qty**.
21. To add the items from the Purchase Order for a delivery with a PO with ASN or only PO, select **Document** from the DSD Receiving Container Detail window. Select the Purchase Order from the header portion. It shows the corresponding items from the item details. Select one or more items from the item details and click **Apply Qty** to add the items to the container receiving.

Figure 9–11 Document Selection Window

The screenshot shows a window titled "Document Selection" with two main sections. The top section, "Purchase Order", contains a table with the following data:

PO ID	PO External ID	Create Date	Customer Order
2203	DP0024	8/31/2015	✓

The bottom section, "Purchase Order Items", contains a table with the following data:

Item	Description	Remaining	Included
101900025	tst item muthu	100	Yes
106000025	TI	200	Yes

At the bottom right of the window are two buttons: "Apply Qty" and "Cancel".

22. Save or confirm the delivery:
 - a. Click **Save** to save the information that you entered so that you can print a delivery receipt, confirm the order, or receive the order at a later time. You return to the DSD Receiving List window.
 - b. Click **Confirm** to complete the transaction. The order is recognized as received.

Enter Extended Attributes

To update the Extended Attributes, select a row and click **Ext. Attributes**. The Extended Attributes window opens. This window captures additional information about an item.

Figure 9–12 Extended Attributes Entry Window

Batch/Lot	Best Before	Origin	Sell By	Use By	Scan Qty
11110					2
458					2

Extended Attributes

Batch/Lot:

Best Before:

Origin:

Sell By:

Use By:

Apply Add Attributes Remove Attributes Cancel

Note: The Extended Attributes Entry window view may vary, depending upon customer chosen attributes.

1. Enter/select the field options.
2. Click **Add Attributes** to add the additional attributes to the item.
3. Click **Apply** to save the changes and return to the previous window.

Adjust a Delivery

You can only adjust the container. To adjust the container, click **Adjust** on the DSD Receiving Container Detail window.

Navigate: Main Menu > Shipping/Receiving > DSD Receiving. The DSD Receiving List window opens. Select the delivery and go to the DSD Receiving Detail screen and from there select the container to adjust.

The Adjust button is only visible for containers in missing, damaged, submitted, or received status. It reverses the container and reopens the container to make adjustments.

This option will reverse the receipt and allow the user to do the receiving process of the same container again.

This option is allowed based on the security settings and also based on the number of days allowed to adjust parameter.

Figure 9–13 DSD Receiving Container Detail Window

Store Inventory Management

Back Info Adjust Notes Print Egt. Attributes

Container
 Container ID: SIM286
 ASN:
 Supplier: 281731884 RMS_ITEM_SupplierSite_333389666
 Customer Orders: No

Document
 Receipt ID:
 Status: Damaged
 Reference Container:
 Display Only Discrepancies:

Date
 Expected Date:
 Received Date:
 Received User:

Totals
 UOM: Cases
 Total SKUs: 1
 Ordered Qty: 0
 Total Qty: 2

Item	Item Description	Primary VPN	Order	UOM	Pack Size	Rem	Rcv	Dmg	UIH Qty
106000025	TI		p12	Units	1	0	1	1	

Client Information null null 1411 - Seattle DSD Receiving Container Detail Help Jump

Print a Delivery Receipt

To print a DSD Receiving Report:

1. Select the print option from the DSD Receiving List window, DSD Receiving Detail window, or DSD Receiving Container Detail window.
2. Click **Print**. The Report Selection window opens.

Report Selection

Please select a report:

	Format	Printer
<input checked="" type="checkbox"/>	Direct Delivery	-Select-
<input checked="" type="checkbox"/>	Direct Delivery Discrepant Item	-Select-

Apply Cancel

3. In the **Printer** field, select the printer you want to use.
 (See “Print or View SIM Reports and Other Output” in Chapter 2 for general information about SIM report output.)
4. Click **Apply**. A message informs you that the DSD Receiving Report was printed.
5. Click **OK**.

Transfers are movements of goods from one location to another location within the company, including store, warehouse, or an external finisher. With the Transfer functions, you can request a transfer create, cancel and approve transfers. Additionally, you can create shipments and containers within the shipment. Each container may have one or more transfers. A transfer may also be applied to several different containers or shipments. For store to store transfer shipments, SIM verifies the receiving store is approved to receive the selected items, and the sending store has the necessary stock on hand to perform the transfer.

You can dispatch a transfer immediately or save it to be dispatched later. At the time the transfer is dispatched, SIM decrements the stock on hand of the sending store and increments the in-transit inventory of the receiving store.

You can also prepare and print a bill of lading (transport document) to accompany a transfer.

A transfer document, once in approved state, can be used to fill a container within a shipment and subsequently received. Once an approved document is attached to a shipment and ready to be shipped or received, it is updated with the shipped and received quantities.

This chapter covers the following buttons on the Main Menu:

- [Transfer](#)
- [Transfer Shipment](#)
- [Transfer Receiving](#)

Transfer

Transfer List Window

Navigate: Main Menu > Shipping/Receiving > Transfer. The Transfer List window opens.

Figure 10–1 Transfer List Window

ID	External Id	Source Type	Source	Destination Type	Destination	Status	Total SKUs	Customer Order
3722		Store	1111 : Charlotte *	Store	1131 : Jacksonville	In Shipping	2	
3081		Store	1111 : Charlotte *	Store	1212 : AM Electronic...	Transfer In Progress	1	✓
3834		Store	1111 : Charlotte *	Store	1131 : Jacksonville	Approved	1	
3835		Store	1111 : Charlotte *	Store	1131 : Jacksonville	Approved	1	
3836		Store	1111 : Charlotte *	Store	1131 : Jacksonville	In Shipping	2	
3963		Store	1111 : Charlotte *	Store	1023 : Croom Store	Approved	1	
3970		Store	1111 : Charlotte *	Store	1131 : Jacksonville	In Shipping	2	
1042		Store	1111 : Charlotte *	Warehouse	2 : N. America Central	Transfer In Progress	0	
3061	150	Store	1111 : Charlotte *	Warehouse	5 : AUS Warehouse	Approved	1	✓
2684		Store	1111 : Charlotte *	Warehouse	5 : AUS Warehouse	Transfer In Progress	0	
3627		Store	1111 : Charlotte *	Warehouse	2 : N. America Central	Transfer In Progress	0	
3628		Store	1111 : Charlotte *	Warehouse	2 : N. America Central	Approved	1	
3629		Store	1111 : Charlotte *	Warehouse	2 : N. America Central	Approved	1	
3631		Store	1111 : Charlotte *	Warehouse	2 : N. America Central	Transfer In Progress	0	
3832		Store	1111 : Charlotte *	Warehouse	2 : N. America Central	Approved	1	
1084		Warehouse	2 : N. America Central	Store	1111 : Charlotte *	New Request	0	
1089	1089	Warehouse	2 : N. America Central	Store	1111 : Charlotte *	New Request	2	
1090	1090	Warehouse	2 : N. America Central	Store	1111 : Charlotte *	New Request	2	
1048		Warehouse	2 : N. America Central	Store	1111 : Charlotte *	New Request	0	
1049		Warehouse	2 : N. America Central	Store	1111 : Charlotte *	New Request	0	
1057		Warehouse	2 : N. America Central	Store	1111 : Charlotte *	New Request	0	
1175	1175	Warehouse	2 : N. America Central	Store	1111 : Charlotte *	New Request	1	
1176	1176	Warehouse	2 : N. America Central	Store	1111 : Charlotte *	New Request	1	
2924	100121212	Warehouse	2 : N. America Central	Store	1111 : Charlotte *	Approved	1	✓

The Transfer List window displays list of transfers for the location into which the user is logged in. The following information is displayed:

Column	Description
ID	SIM identifier for the transfer
External ID	Identifier supplied by an external system
Source Type	Type of location transferring the goods
Source	ID and name of the sending location
Destination Type	Type of location receiving the goods
Destination	ID and name of the receiving location
Status	Current status of the transfer or request: <ul style="list-style-type: none"> ■ Approved ■ Canceled Request ■ Canceled Transfer ■ Completed ■ In Shipping ■ New Request ■ Rejected Request ■ Requested ■ Request in Progress ■ Transfer in Progress
Total SKUs	Total number of unique items for the transfer
Customer Order	Indicates if the transfer contains any customer orders or not

From the Transfer List window, you can do the following:

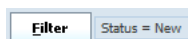
- [Filter the Transfer List](#)

- [Request a Transfer](#)
- [Create a Transfer](#)
- [Edit a Transfer or Transfer Request](#)
- [Respond to a Transfer Request](#)
- [Approve a Transfer](#)
- [Delete a Transfer](#)
- [Close the Transfer](#)
- [View a Transfer](#)
- [Print a Transfer](#)

From the Transfer List window, click **Back** to return to the Shipping/Receiving menu.

Filter the Transfer List

You can filter the list of transfers to limit the transfers listed. If the list is currently filtered, the filtering is shown next to the Filter button.



To filter the list of transfers or to change the current filtering, follow these steps:

1. In the Transfer List window, click **Filter**. The Transfer List Filter window opens.

Figure 10–2 *Transfer List Filter Window*

2. Enter or select search values as needed to specify the transfers that you want to list. All values are optional. If you leave a field blank or select All, all values are included in the search.

Date Filters – Enter or select From Date and To Date values to limit the date range. The date is the creation date if in Pending status, the dispatch date if in Dispatched status, or the close date if in Received or Canceled status.

Location Filter – Select a destination or source. If a value other than All is selected for the type, enter the destination and source location to select all transfers to or from that location.

Document ID – Enter the document ID to limit the search to a specific transfer document.

Context Type – If the document is related to a promotion or repair, select the context type to limit the results returned. For example, select “Promotion” to limit results to promotions.

Context Value – If the transfer is related to a promotion, enter a promotion ID or click the **Ellipsis** button to look up a promotion. See “[Look Up a Promotion](#)” for more information.

Item – Enter the Item ID or click the **Ellipsis** button to look up an item.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Transfer List Filter window. See “[Item Lookup](#)” in [Chapter 20](#) for more information.

Doc External ID – Enter a document ID for a transfer created by a system outside of SIM.

Customer Order ID – Enter the customer order number to search for a specific customer order.

Fulfillment Order ID – Enter the fulfillment order number to search for documents with a specific fulfillment order.

Customer Orders – Select this check box if you want to search for customer orders only.

Status – Select a status from the drop-down list. The default is Active. The Active status selects documents in Approved, In Shipping, New Request, Requested, Request in Progress, and Transfer in Progress.

User – Select a user to find all documents created by a specific user.

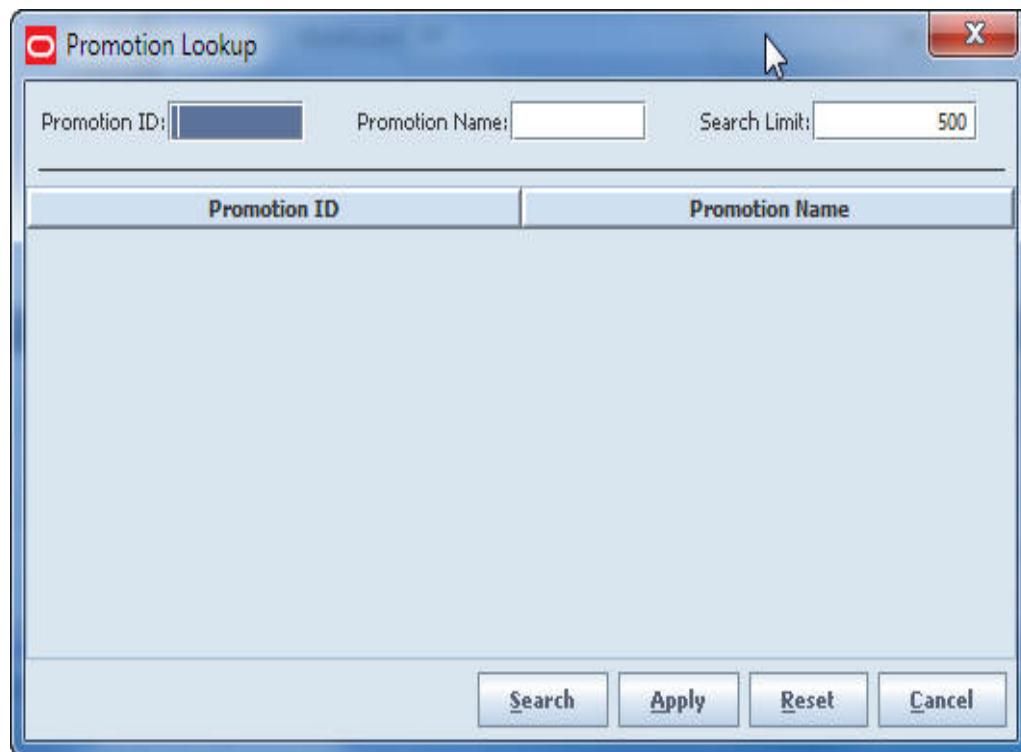
3. Click **Apply**. You return to the Transfer List window, where your filter has been applied.

Look Up a Promotion

You can look up a promotion when you are filtering the list.

In the Context Type field, select Promotion. If you click the **Ellipsis** button on the Context Value field, the Promotion Lookup window opens.

Figure 10–3 Promotion Lookup Window



To look up a promotion ID for a transfer:

1. Enter any of the following optional values to limit promotion search results:

Promotion ID – If you want to limit the search to a particular promotion ID, enter that identifier.

Promotion Name – If you want to search on the promotion name, enter a string of characters found in the promotion name.

Search Limit – If you want to change the maximum number of promotions returned from the search, enter an integer value. The default value is 500.

2. Select the promotion you want to use for the transfer.
3. Click **Apply** to return to the Transfer List window.

Request a Transfer

Request a transfer when you want to receive items from another location.

Note: To edit a transfer request that is in New Request status (started but not yet requested), select the transfer request in the Transfer List window and begin with Step 5.

Navigate: Main Menu > Shipping/Receiving > Transfer. The Transfer List window opens.

To create a transfer request, follow these steps:

1. Click **Create Request**. The Transfer Request window opens.

Figure 10–4 Transfer Request Create Window

2. Select the transferring store in the **Source** field or select a buddy store from the drop-down list below.

To select another store, click the **Ellipsis** button to look up a location that is not on the drop-down list. The Store Lookup window opens.

Figure 10–5 Store Lookup Window

To look up and select a location, follow these steps:

- a. Complete one of the fields on the lookup screen to limit the search results:
 - Store ID** – Enter a complete store number.
 - Store Name** – Enter a complete or partial store name.
 - b. Click **Search**. The search results are displayed in the list.
 - c. Select the location that you want to use.
 - d. Click **Apply**. You return to the Transfer Request window.
3. Enter or select the values for the remaining fields:

Source Type – This field is set to Store and cannot be changed. A Request can only be used for a store to store transfer.

Not After Date – Enter or select the date after which the items no longer should be shipped from the source location.

Context Type – If the transfer is related to a promotion or repair, select the context type to identify transfers belonging to special situation. For example, select “Promotion” to identify the items on a transfer that are for a specific promotion

Context Value – If the transfer is related to a promotion, enter a promotion ID or click the **Ellipsis** button to look up a promotion. See “[Look Up a Promotion](#)” for more information.

4. Click **Apply**. The Transfer Detail window opens.

Figure 10–6 Transfer Detail Window – Create Request

Item	Item Description	UOM	Pack Size	Inventory	Requested
10000008	PS_inBlack-Blueberry	Cases	1	33	33

5. Select **Allow Partial Delivery**, if applicable. This is populated based on the customer order. If the box is not checked, then when accepting a transfer request, the user must accept the full amount being requested.
6. For each item you want to manually add to the transfer request, follow these steps:
 - a. Click **Add Item**.
 - b. In the **Item** field, enter the item number or click the **Ellipsis** button to look up the item.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Transfer Request window. See “[Item Lookup](#)” in [Chapter 20](#) for more information, or click **Scanner** to scan the item. See “[Scan an Item \(Scanner Button\)](#)” in [Chapter 2](#) for more information.
 - c. For each item on the transfer, complete these fields:

UOM – From the drop-down list, select the unit of measure.
Requested – Enter the number of units requested.
7. To remove items from the transfer request, follow these steps:
 - a. Select the items you want to delete.
 - b. Click **Remove Item**. You receive the following prompt: “The selected line item(s) will be deleted. Do you want to continue?”
 - c. Click **Yes**.
8. To enter any additional information that you want to include with the transfer, click **Notes**. The Transfer Notes window opens. For each note, enter your information and click **Save**. When you have finishing entering notes, click **Apply**.

9. Save or complete the request:
 - To save the request so you can change it later, click **Save**. The request is saved with a status of New Request.
 - To complete the request, click **Request**. The transfer is saved with a status of Requested and waiting for the source location to approve the transfer.

You are returned to the Transfer List window.

Create a Transfer

Create a transfer when you want to send items to another location. You can create a new transfer without first receiving a transfer request. You can also view and edit a transfer or transfer request, modify the transfer as needed, and approve the transfer.

Note: To edit a transfer that is Transfer In Progress status (not yet approved), select the transfer in the Transfer List window and begin with Step 10.

Navigate: Main Menu > Shipping/Receiving > Transfer. The Transfer List window opens.

To create a transfer, follow these steps

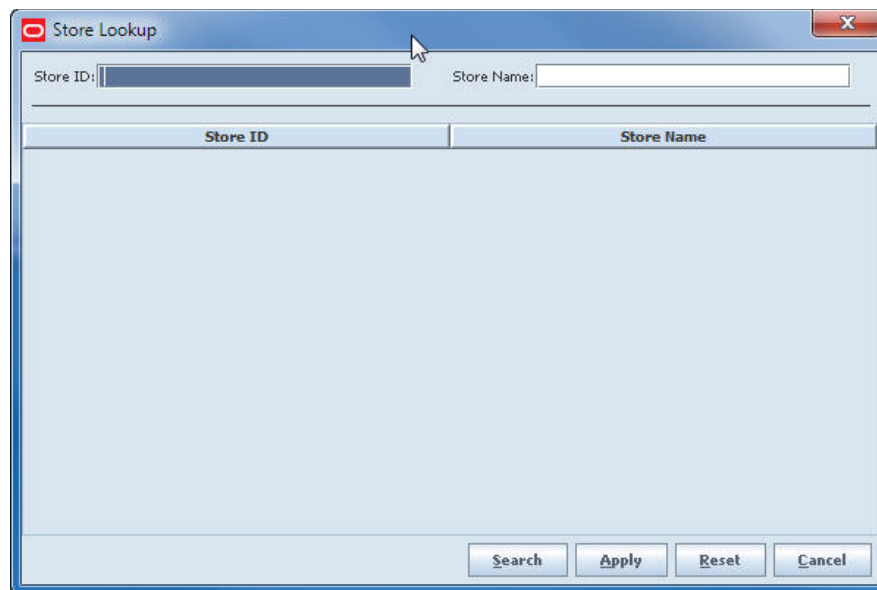
1. Click **Create Transfer**. The Transfer Create window opens.

Figure 10–7 Transfer Create Window

2. Select the destination type from the drop-down list.
3. Enter the destination in the **Destination** field or select a buddy store from the drop-down list. The buddy store is only available when the destination type is store.

To look up a location, click the **Ellipsis** button. The window to look up the destination opens. For example, the Store Lookup window opens.

Figure 10–8 Store Lookup Window



To look up a location, follow these steps:

- a. Complete one of the fields to limit the search results:
 - For a store destination:
 - Store ID** – Enter a complete store number.
 - Store Name** – Enter a complete or partial store name.
 - For a finisher destination:
 - Finisher ID** – Enter a complete finisher number.
 - Finisher Name** – Enter a complete or partial finisher name.
 - For a warehouse destination:
 - Warehouse ID** – Enter a complete warehouse number.
 - Warehouse Name** – Enter a complete or partial warehouse name.
 - b. Click **Search**. The results of your search are listed.
 - c. Select the location you want.
 - d. Click **Apply**. You return to the Transfer Create window, with the selected location displayed.
4. **Not After Date** – Enter or select the date after which the transfer cannot be dispatched.
 5. In the **Context Type** field, select either Promotion or Repair.
 6. (Promotion only) In the **Context Value** field, enter the promotion ID, or click the **Ellipsis** button to look up the promotion ID. See “[Look Up a Promotion](#)” for more information.
 7. If Finisher or Warehouse was selected for the Destination Type, enter the authorization number.

8. Select **Use Unavailable**, if applicable. If the box is checked, unavailable inventory can be used for the transfer. If unavailable is used, all items added to the transfer will be from unavailable inventory.
9. Select **Allow Partial Delivery**, if applicable. This is populated based on the customer order. If the box is not checked, then when accepting a transfer, the user must accept the full amount being requested.
10. Click **Apply**. The Transfer Detail window opens.

Figure 10–9 Transfer Detail Window

The screenshot shows the 'Store Inventory Management' application window. The 'Transfer/Allocation' section includes fields for Document ID (201), Doc External ID, Source (1111 Charl...), Destination (1111 Jacks...), and Customer Order Related (unchecked). The 'Document' section shows Status: Transfer In Progress, Auth Number, Context Type (Repair), Context Value, Allow Partial Delivery (unchecked), and Use Unavailable (checked). The 'Date' section shows Not After Date (8/7/2015), Create Date (7/8/2015), and Last Update Date (7/8/2015). The 'Totals' section shows UOM: Case and Total SKU: 1. Below these fields is a table with columns: Item, Item Description, UOM, Pack Size, Inventory, and Transfer. The table contains one row: 100000211, Test Item 100000211, Case, 10, 0, 0. At the bottom, there are buttons for Client Information, SM User, 1111 - Charlotte *, Transfer Detail, Help, and Jump.

11. For each item you want to manually add to the transfer request, follow these steps:
 - a. Click **Add Item**.
 - b. In the **Item** field, enter the item number or click the **Ellipsis** button to look up the item.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Transfer Request window. See “[Item Lookup](#)” in [Chapter 20](#) for more information, or click **Scanner** to scan the item. See “[Scan an Item \(Scanner Button\)](#)” in [Chapter 2](#) for more information.
 - c. For each item on the transfer, complete these fields:

UOM – From the drop-down list, select the unit of measure.

Transfer – Enter the number of units to send.
12. To remove items from the transfer, follow these steps:
 - a. Select the items you want to delete.
 - b. Click **Remove Item**. You receive the following prompt: “The selected line item(s) will be deleted. Do you want to continue?”
 - c. Click **Yes**.
13. To enter any additional information that you want to include with the transfer, click **Notes**. The Transfer Notes window opens. For each note, enter your information and click **Save**. When you have finishing entering notes, click **Apply**.
14. Save or approve the transfer:
 - To save the transfer without approving it, click **Save**. The transfer is saved with a status of Transfer In Progress. To edit the transfer later, select the transfer in the Transfer List window.
 - To approve the transfer, click **Approve**. You receive a prompt to verify that you want to approve the transfer. Click **Yes**. The status changes to Approved.

You are returned to the Transfer List window.

Edit a Transfer or Transfer Request

Navigate: Main Menu > Shipping/Receiving > Transfer. The Transfer List window opens.

Select the transfer or transfer request you want to edit. The Transfer Detail window opens. You can make the following updates:

- [Add and Remove Items](#)
- [Set the Not After Date and Authorization Number](#)

Add and Remove Items

To add and remove items:

1. To add items to the transfer, follow these steps:
 - a. Click **Add Item**. An item entry is added.
 - b. In the **Item** field, enter the item number, or click the **Ellipsis** button to look up the item.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Transfer Detail window. See “[Item Lookup](#)” in [Chapter 20](#) for more information. Or click **Scanner** to scan the item. See “[Scan an Item \(Scanner Button\)](#)” in [Chapter 2](#) for more information.
 - c. Update fields as needed:

UOM – From the drop-down list, select the unit of measure.

Pack Size – Enter the pack size.

Transfer – Enter the quantity to transfer.
 - d. To add another item, click **Add Item**.
2. To remove items from the transfer, follow these steps:
 - a. Select the items you want to remove.
 - b. Click **Remove Item**. You receive the following prompt: “The selected line item(s) will be deleted. Do you want to continue?”
 - c. Click **Yes**.

Set the Not After Date and Authorization Number

To set the Not After Date and authorization number:

1. Click Not after date, date column, and select date. This date is used to prevent shipping items once this date is reached. Additionally, transfers will be marked as closed.
2. Enter the authorization number. It should be done at the time of creation of transfer.
3. Click **Save**.

Respond to a Transfer Request

You can approve or reject a request to transfer items from your store to another location. Transfer requests that you can accept or reject are in Requested status.

Navigate: Main Menu > Shipping/Receiving > Transfer. The Transfer List window opens.

1. If you want to limit the Transfer List to show only requested transfers, filter the list. See ["Filter the Transfer List."](#)
2. Select a transfer with a status of Requested. The Transfer Detail window opens.

Figure 10–10 Transfer Detail Window – Respond to a Transfer Request

3. Accept or reject the transfer request. See the following topics:
 - [Accept a Transfer Request Without Changes](#)
 - [Accept a Transfer Request With Changes](#)
 - [Reject a Transfer Request](#)

Note: Click **Save** at any point if you want to save your changes and return to the Transfer List window. Click **Cancel** at any point to return without saving any changes.

Accept a Transfer Request Without Changes

If you want to accept the entire transfer request without changes and ship all requested line items, follow these steps:

1. Click **Default Quantities**. The Accepted field for each item is completed with the same quantity as the Requested field. (If you prefer, you can instead enter values manually in the Accepted field for every item on the transfer request.)

Note: If all Accepted fields on the transfer request are blank or zero when you click Accept, you will be asked whether you want to reject the entire transfer request.

2. Click **Accept**. You receive the following prompt: "Are you sure you want to accept the selected transfer now?"
3. Click **Yes**. You return to the Transfer List window.

Accept a Transfer Request With Changes

If you want to accept the transfer request but you need to make some changes to the line items requested, follow these steps:

1. If you want to complete the Accepted field for all items with the requested quantities, click **Default Quantities**; otherwise enter all Accepted quantities manually.

Note: A blank or zero value in the Accepted field for any item means that you are rejecting the transfer request for that item.

2. For each item that you need to change, update these fields as needed:

UOM – From the drop-down list, select the unit of measure.

Accepted – Enter the number of items to be sent to the requesting location. To reject an individual item on the transfer, enter an Accepted quantity of 0.

3. Click **Accept**. You receive the following prompt: “Are you sure you want to accept the selected transfer now?”
4. Click **Yes**. You return to the Transfer List window.

Reject a Transfer Request

If you need to reject the entire transfer request and all line items requested, follow these steps:

1. Click **Reject**. You receive the following prompt: “Are you sure you want to reject the transfer request?”
2. Click **Yes**. You return to the Transfer List window.

Approve a Transfer

To approve the transfer, click **Approve** in the Transfer Detail window. You receive a prompt to verify that you want to approve the transfer. Click **Yes**. The status changes to Approved.

Figure 10–11 Transfer Detail Window

Item	Item Description	UOM	Pack Size	Inventory	Transfer
100000331	Test Item 100000331	Cases	10	0	0

Delete a Transfer

You can delete the following:

- Transfers created at your locations with a status of Transfer In Progress (created but not approved). The status of a deleted transfer is set to Cancelled Transfer.
- Requests created at your location are in New Request status. The status of a deleted transfer request is set to Cancelled Request.

Navigate: Main Menu > Shipping/Receiving > Transfer. The Transfer List window opens.

To delete transfers or transfer requests:

1. If you want to filter the transfer list, see "[Filter the Transfer List](#)."
2. Select the transfer that you want to delete. The Transfer Detail window opens.

Figure 10–12 Transfer Detail Window - Delete a Transfer

Item	Item Description	UOM	Pack Size	Inventory	Transfer
100000231	Test Item 100000231	Cases	20	0	0

3. Click **Delete**. A message is displayed: "Are you sure you want to delete the selected transfer?"
4. Click **Yes**. You are returned to the Transfer List screen.

Close the Transfer

There are various situations where a transfer document may need to be closed. Many times a transfer has been partially shipped and in order to prevent further shipments of item, the document must be closed. This may be due to a shortage of an item during a promotion period and once over, the product is no longer needed. Closing a transfer can happen in a variety of ways:

- Store shipping transfers:
 - Manual closure - The user manually closes the transfer on the source side only. The user is only allowed to do this if there are no items on an open shipment. The Not after date is not mandatory and hence manual closure should be used to close such documents which do not have a not after date.
 - Batch closure - A nightly Batch closes the transfer, when the not after date has passed, and no open shipments exist.
 - Automatic Closure - When all the item quantities have been shipped, the transfer document is auto-closed.
 - RMS sends a closure message. The Not after date is not used for this.
- Warehouse or external finisher to store shipments:
 - RMS closure - RMS can cancel the pending items on the transfer and close the transfer regardless of open receipts from the warehouse or finisher.

- Auto-close: All items have been shipped to the store.
- Allocations follows the same pattern as transfers.

Following are additional rules for closing a transfer:

- For store outbound shipments: If a shipment exists that is in progress but not yet shipped, the user has to cancel the shipment or remove the items for that specific transfer before the transfer can be closed. This can prevent any transfer from closing, regardless of auto or manual closure.
- In all cases, it is possible to receive against a closed transfer, or even allow an ASN to be processed against a closed transfer.
- For store to store, finisher, or warehouse, if the transfer is manually or automatically closed and there are items still left on the transfer, those items reservation are removed and moved back to available or unavailable inventory.
- For a transfer in a requested state, RMS can cancel the transfer request until approval.

Navigate: Main Menu > Shipping/Receiving > Transfer. The Transfer List window opens.

To close a transfer:

1. If you want to filter the transfer list, see "[Filter the Transfer List.](#)"
2. Select the transfer that you want to close. The Transfer Detail window opens.

Figure 10–13 Transfer Detail Window - Close a Transfer

Item	Item Description	UOM	Pack Size	Inventory	Requested
100110003	100110003	Cases	1	165	1

3. Click **Close Transfer**. A message is displayed: "Are you sure you want to close the selected transfer?"
4. Click **Yes**. You are returned to the Transfer List screen.

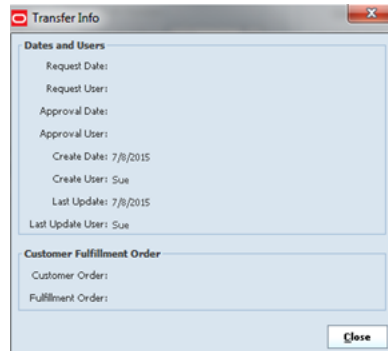
View a Transfer

You can view information on the transfer document and details on the transfer.

View Transfer Information

To view more details on the transfer, click **Info**. The Transfer Info window opens. Click **Close** to return to the previous window.

Figure 10–14 Transfer Info Window



The following information is shown in the Dates and Users section:

Request Date – The date on which the transfer document was requested.

Request User – The user who requested the transfer document.

Approval Date – The date on which the transfer document was approved.

Approval User – The user who approved the transfer document.

Create Date – The date on which the transfer document was created.

Create User – The user who created the transfer document.

Last Update – The date on which the transfer document was last updated.

Last Update User – The user who last updated the transfer document.

The following information is shown in the Customer Fulfillment Order section:

Customer Order – Customer order number provided by Order Management System (OMS).

Fulfillment Order – Fulfillment order number provided by OMS.

View Item Details

Once an item on a transfer has been shipped, you can view the shipment details for the item and if the item was part of a store to store transaction, when the item is received, you can view the receipt details. In addition, if there are any extended attributes or if the item has UINs (Unique Identification Numbers), the details can be viewed. An item on a transfer may be split between multiple containers for a shipment as well as split between multiple shipments. of an item for transfers The transfer can only be in the following statuses:

- Completed
- In Shipping (only once the item is shipped)

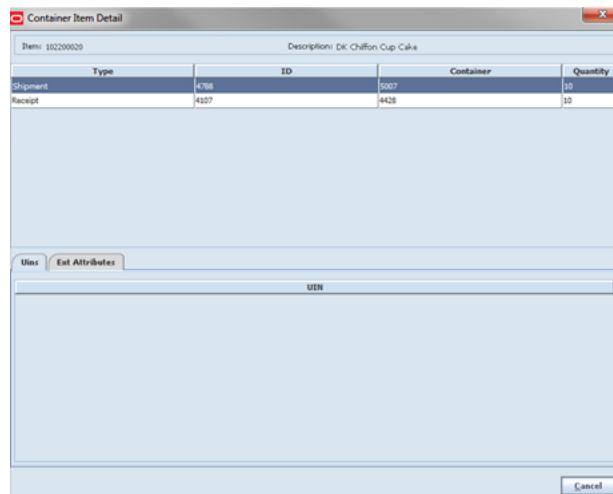
Navigate: Main Menu > Shipping/Receiving > Transfers. The Transfer List window opens.

To view a transfer or transfer request with one of these statuses, follow these steps:

1. If you want to filter the transfer list, see "[Filter the Transfer List](#)." Since the list defaults to active transfers, select Completed status.

2. Select the transfer that you want to view. The Transfer Detail window opens.
3. Select the item you want to view and click **Item Details**. The Container Item Detail window opens.

Figure 10–15 Container Item Detail Window



The following information is shown:

Item – The ID of the item.

Description – The description of the item.

Shipment ID – ID of the shipment that contains the containers and items.

Type – The type which is either Shipment or Receipt.

ID – Shipment ID or Receipt ID.

Container – List of container IDs which held this item.

Quantity – The quantity of the item in the container.

The following tabs are available:

Uins – The UINs if the store is UIN enabled and the item has a UIN associated to it. This field gets populated by the scanned and shipped UINs from the Transfer shipment.

Ext Attributes – The extended attributes are shown if the store and items are configured for it and if they were captured by the user during shipping or receiving.

4. Click **Close** to return to the Transfer Detail window.

Print a Transfer

Navigate: Main Menu > Shipping/Receiving > Transfers. The Transfer List window opens.

Figure 10–16 Transfer List Window

ID	External Id	Source Type	Source	Destination Type	Destination	Status	Total SKUs	Customer Order
3722		Store	1111 : Charlotte *	Store	1131 : Jacksonville	In Shipping	2	
3081		Store	1111 : Charlotte *	Store	1212 : AM Electronic...	Transfer In Progress	1	✓
3834		Store	1111 : Charlotte *	Store	1131 : Jacksonville	Approved	1	
3835		Store	1111 : Charlotte *	Store	1131 : Jacksonville	Approved	1	
3836		Store	1111 : Charlotte *	Store	1131 : Jacksonville	In Shipping	2	
3963		Store	1111 : Charlotte *	Store	1023 : Croom Store	Approved	1	
3970		Store	1111 : Charlotte *	Store	1131 : Jacksonville	In Shipping	2	
1042		Store	1111 : Charlotte *	Warehouse	2 : N. America Central	Transfer In Progress	0	
3061	150	Store	1111 : Charlotte *	Warehouse	5 : AUS Warehouse	Approved	1	✓
2684		Store	1111 : Charlotte *	Warehouse	5 : AUS Warehouse	Transfer In Progress	0	
3627		Store	1111 : Charlotte *	Warehouse	2 : N. America Central	Transfer In Progress	0	
3628		Store	1111 : Charlotte *	Warehouse	2 : N. America Central	Approved	1	
3629		Store	1111 : Charlotte *	Warehouse	2 : N. America Central	Approved	1	
3631		Store	1111 : Charlotte *	Warehouse	2 : N. America Central	Transfer In Progress	0	
3832		Store	1111 : Charlotte *	Warehouse	2 : N. America Central	Approved	1	
1084		Warehouse	2 : N. America Central	Store	1111 : Charlotte *	New Request	0	
1089	1089	Warehouse	2 : N. America Central	Store	1111 : Charlotte *	New Request	2	
1090	1090	Warehouse	2 : N. America Central	Store	1111 : Charlotte *	New Request	2	
1048		Warehouse	2 : N. America Central	Store	1111 : Charlotte *	New Request	0	
1049		Warehouse	2 : N. America Central	Store	1111 : Charlotte *	New Request	0	
1057		Warehouse	2 : N. America Central	Store	1111 : Charlotte *	New Request	0	
1175	1175	Warehouse	2 : N. America Central	Store	1111 : Charlotte *	New Request	1	
1176	1176	Warehouse	2 : N. America Central	Store	1111 : Charlotte *	New Request	1	
2924	100121212	Warehouse	2 : N. America Central	Store	1111 : Charlotte *	Approved	1	✓

1. If you want to filter the transfer list, see “[Filter the Transfer List.](#)”
2. Select the transfer that you want to print.
3. Click **Print**. The Report Selection window opens.
4. Select the **Transfer** format and the printer.
5. Click **OK**.

Transfer Shipment

Transfer Shipment List Window

Navigate: Main Menu > Shipping/Receiving > Transfer Shipment. The Transfer Shipment List window opens.

Figure 10–17 Transfer Shipment List Window

ID	ASN	Status	Destination Type	Destination	Last Update	Containers	Customer Order
1021	1021	In Progress	Store	1131 Jacksonville	8/6/2015	1	
1147	1147	In Progress	Store	1131 Jacksonville	9/23/2015	2	
1148	1148	In Progress	Store	1131 Jacksonville	8/15/2015	1	
1149	1149	In Progress	Store	1131 Jacksonville	8/15/2015	0	
1150	1150	In Progress	Store	1131 Jacksonville	8/5/2015	1	
121	121	In Progress	Store	1212 AM Electronics - ...	7/25/2015	4	
1302	1302	In Progress	Store	1131 Jacksonville	8/7/2015	1	
1303	1303	In Progress	Store	1131 Jacksonville	8/7/2015	1	
1304	1304	In Progress	Store	1131 Jacksonville	8/7/2015	1	
1305	1305	In Progress	Warehouse	5 AUS Warehouse	8/11/2015	1	
1306	1306	In Progress	Warehouse	5 AUS Warehouse	8/17/2015	1	
1321	1321	In Progress	Store	1131 Jacksonville	8/7/2015	1	
1423	1423	In Progress	Store	1024 Croom - 1024 st...	9/23/2015	1	
144	144	In Progress	Store	1211 Boston	6/23/2015	1	
1441	1441	In Progress	Store	1131 Jacksonville	8/11/2015	1	
1442	1442	In Progress	Store	1131 Jacksonville	8/11/2015	2	
145	145	In Progress	Store	1211 Boston	8/15/2015	1	
146	146	In Progress	Store	1211 Boston	6/23/2015	1	
1462	1462	In Progress	Store	1131 Jacksonville	8/11/2015	1	
1481	1481	In Progress	Store	1131 Jacksonville	8/11/2015	1	
1482	1482	In Progress	Store	8758 DP Store	8/11/2015	1	
1502	1502	In Progress	Store	1131 Jacksonville	8/11/2015	0	

The Transfer Shipment List window displays the following information about existing shipments:

Column	Description
ID	SIM identifier for the shipment
ASN	Advanced Shipment Notice number
Status	Current status of the shipment: <ul style="list-style-type: none"> ■ New ■ In Progress ■ Canceled ■ Submitted ■ Shipped
Destination Type	Type of location to receive the shipment (Store, Warehouse, Finisher)
Destination	ID and name of the receiving location
Last Update	Last date the shipment was updated
Containers	Total number of containers for the shipment
Customer Order	Identifies if customer orders are in the shipment

From the Transfer Shipment List window, you can do the following:

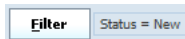
- [Filter the Transfer Shipment List](#)
- [Create a Transfer Shipment](#)
- [Edit a Transfer Shipment](#)
- [View Customer Order Information in the Shipment](#)
- [Prepare a Bill of Lading](#)
- [Dispatch a Transfer Shipment](#)

- [Delete a Transfer Shipment](#)
- [Create or Edit a Container](#)
- [Create a Container Label](#)
- [Confirm a Container](#)
- [Adjust a Completed Container](#)
- [Delete a Container](#)

From the Transfer Shipment List window, click **Back** to return to the Shipping/Receiving menu.

Filter the Transfer Shipment List

Whenever a list window is displayed, you can filter the list of transfers to limit the transfers listed. If the list is currently filtered, the filtering is shown next to the Filter button.



To filter the list of transfer shipments or to change the current filtering, follow these steps:

1. In the Transfer Shipment List window, click **Filter**. The Transfer Shipment List Filter window opens.

Figure 10–18 *Transfer Shipment List Filter Window*

2. Enter or select search values as needed to specify the shipments that you want to list. All values are optional. If you leave a field blank or select All, every value is included in the search.

Date Filters – Enter or select From Date and To Date values to limit the date range. The date is the last date the shipment was updated.

To Location Filter – Select a destination type. If a value other than All is selected for the type, the destination location is available to select all shipments to that location.

Document ID – Enter the document identifying number to limit the search to a particular transfer or allocation.

ASN – Enter an ASN once it has been created for a shipment.

Customer Order ID – Enter the customer order number to search for a specific customer order. When specified, the system looks through the documents within the shipments for the customer order ID and returns a list of shipments with the identified customer order.

Fulfillment Order ID – Enter the fulfillment order number to search for a specific fulfillment order for the selected customer order. This further limits the shipments by fulfillment order ID.

Customer Orders – Select this check box if you want to search for shipments with customer orders.

Status – Select a status from the drop-down list. The default is Active. Active status selects transfer shipments in New, In Progress, and Submitted status.

Context Type – Select the context type to find any shipments with documents related to a promotion or repair. Select the context type to limit the results returned. For example, select “Promotion” to limit results to promotions.

Context Value – If the transfer is related to a promotion, enter a promotion ID or click the [Ellipsis](#) button to look up a promotion. See “[Look Up a Promotion](#)” for more information.

3. Click **Apply**. You return to the Transfer Shipment List window, where your filter has been applied.

Create a Transfer Shipment

Navigate: Main Menu > Shipping/Receiving > Transfer Shipment. The Transfer Shipment List window opens.

To create a transfer shipment, follow these steps:

1. Click **Create**. The Transfer Shipment Create window opens.

Figure 10–19 Transfer Shipment Create Window

2. Select the destination type from the drop-down list.
3. Enter the destination in the **Destination** field.

To look up a location, click the [Ellipsis](#) button. The window to look up the destination opens. For example, the Store Lookup window opens.

Figure 10–20 Store Lookup Window

The screenshot shows a 'Store Lookup' window. At the top, there is a title bar with the text 'Store Lookup' and a close button. Below the title bar, there are two input fields: 'Store ID:' and 'Store Name:'. Below these fields is a table with two columns: 'Store ID' and 'Store Name'. The table is currently empty. At the bottom of the window, there are four buttons: 'Search', 'Apply', 'Reset', and 'Cancel'.

To look up a location, follow these steps:

- a. Complete one of the fields to limit the search results:
 - For a store destination:
 - Store ID** – Enter a complete store number.
 - Store Name** – Enter a complete or partial store name.
 - For a finisher destination:
 - Finisher ID** – Enter a complete finisher number.
 - Finisher Name** – Enter a complete or partial finisher name.
 - For a warehouse destination:
 - Warehouse ID** – Enter a complete warehouse number.
 - Warehouse Name** – Enter a complete or partial warehouse name.
 - b. Click **Search**. The results of your search are listed.
 - c. Select the location you want.
 - d. Click **Apply**. You return to the Transfer Shipment Create window, with the selected location displayed.
4. If Finisher or Warehouse was selected for the Destination Type, enter the authorization number.
 5. Click **Apply**. The Transfer Shipment Detail window opens.

Figure 10–21 Transfer Shipment Detail Window – Create Shipment

6. To create a container, see "[Create or Edit a Container](#)".
7. To view more details on the shipment, click **Info**. The Transfer Shipment Info window opens. Click **Close** to return to the previous window.

Figure 10–22 Transfer Shipment Info Window

8. To enter any additional information that you want to include with the transfer, click **Notes**. The Shipment Notes window opens. For each note, enter your information and click **Save**. When you have finishing entering notes, click **Apply**.
You are returned to the Transfer Shipment List window.

Edit a Transfer Shipment

Navigate: Main Menu > Shipping/Receiving > Transfer Shipment. The Transfer Shipment List window opens.

Select the shipment you want to edit. The Transfer Shipment Detail window opens. You can make the following updates:

- [Add Containers to a Shipment](#)
- [Add an Authorization Number to a Shipment](#)

Add Containers to a Shipment

To add a container:

1. Click **Create Container**. The Transfer Shipment Container Detail window opens.

Figure 10–23 Transfer Shipment Container Detail

2. To add items into the container from one or more transfer documents, see "[Select Transfer Documents for the Container](#)".
3. To add loose items into the container, see "[Add Items without a Transfer](#)."
4. For additional steps when working within a container, see "[Create or Edit a Container](#)."

Add an Authorization Number to a Shipment

The authorization number is only available when shipping to a warehouse or finisher.

To add an authorization number, follow these steps:

1. Click **Info**. The Transfer Shipment Info window opens.
2. Enter the authorization number. Click **Save**.

View Customer Order Information in the Shipment

In the Transfer Shipment Detail window, a check in the Customer Order column indicates if a shipment includes customer orders. The customer order information related to the shipment can be viewed.

To view the customer order information, follow these steps:

1. Select a container and click **Customer Orders**. The Customer Order Information window opens.

The following information is displayed:

Customer Order – ID assigned to this delivery.

Fulfillment Order – Fulfillment ID provided by the order management system.

ID – Container ID assigned by the system.

Container ID – Shipping container number which represents the number on the barcode for the container within the shipment.

Status – Current status of the order.

Total SKUs – Total number of line items for the fulfillment order within the container.

Comments – Comments, if available.

2. When you are done viewing the information, click **Back**.

Prepare a Bill of Lading

Navigate: Main Menu > Shipping/Receiving > Transfer Shipment. The Transfer Shipment List window opens.

To update bill of lading (BOL) information:

1. Click **BOL**. The BOL Detail window opens.

Figure 10–24 BOL Detail Window – Transfer Shipment

The screenshot shows the 'BOL Detail Window' in the 'Store Inventory Management' application. The window title is 'Store Inventory Management' and it has 'Save' and 'Cancel' buttons. The main content area is divided into several sections:

- Shipment Summary:** Shipment ID: 4145, Create Date: 10/5/2015, Bill Of Lading ID: 4447, Dispatch Date: (empty).
- Additional:** Motive: Transfer (dropdown), Requested Pickup Date: (calendar icon), Tax ID: (empty).
- Ship From:** 1111 - Charlotte *, 123 Street, Anytown, Anycity, MN 50250.
- Ship To:** Address Type: -Select-, 1131 - Jacksonville, 123 Street, Anytown, Anycity, MN 50250.
- Carrier:** Type: Receiver, Sender, Third Party; Carrier: DHL, FedEx, Other, UPSP.
- Service:** 2 Day, 3 Day, Express.
- Carrier Address:** Name: (empty).
- Containers:** A table with columns: ID, Container ID, Weight (LBS), Package Type, Tracking ID.

At the bottom, there is a navigation bar with buttons: Client Information, SIM User, 1111 - Charlotte *, BOL Detail, Help, Jump.

2. Update the following fields as needed:

Motive – The default value is Transfer. If needed, select a different value.

Alternate Destination Address – If the transfer is to be shipped to an address other than the address displayed (under Ship To), enter the full shipping address.

Requested Pickup Date – Enter or select the date when the shipment will be picked up.

Type – Select the type of carrier to use, Sender, Receiver or Third Party. The default value depends on the setting for each destination type.

Carrier – The provider that will handle the shipment. If Third-party is selected, select the provider. If Other is selected, enter the name and address. All containers for a shipment are required to be with the same carrier, but each container will have a separate tracking id to identify each package.

Service – If third-party provider is selected, choose the service method for the shipment.

Container – If any containers have been added to the shipment, the following container information will display. Canceled containers will not display. For further details on how to add container information, see "[Create or Edit a Container](#)."

- **ID** – System ID field.
- **Container ID** – Container identifier that is printed on the container label.
- **Weight** – This represents the weight of the container and is specified when the container is created or edited.
- **Package Type** – This represents the size of the package and is specified when the container is created or edited.
- **Tracking ID** – This may be manually entered by the user or may be returned from a manifesting system when the carrier is contacted through a web service call.

3. Click **Save**.

Print a Bill of Lading

For any transfer, you can print a bill of lading (transport document) that accompanies the merchandise when it is shipped. You can print the bill of lading at any time; however, if the transfer is not yet shipped or if it is cancelled, the bill of lading is marked DRAFT or CANCELLED.

Note: Bill of lading information must be entered or updated when transfers are created or updated. Some information for the bill of lading (such as address) is filled in automatically, but other information must be entered manually.

To print a bill of lading, follow these steps:

1. If you want to filter the transfer shipment list, see "[Filter the Transfer Shipment List](#)."
2. Select the transfer for which you want to print a bill of lading.
3. Click **Print**.
4. Select the **Bill of Lading** format and the printer.
5. Click **Apply**.

Adjust a Carrier after Manifesting

The Adjust Carrier button is displayed on the BOL Detail screen to enable the user to change the carrier. If the user decides to change the carrier, SIM prompts the user to confirm the action.

All containers must ship with the same carrier. A manifesting web service call is made, when the user confirms a container within a shipment. When the first container is confirmed, the BOL Detail screen is locked down and can no longer change details. However, if there is a valid reason to change the carrier, all containers will need to be reopened and reconfirmed. When the Adjust Carrier button is pressed, all containers on the shipment will move back to In Progress and each will need to go through the confirm process again to use the new carrier.

Navigate: Main Menu > Shipping/Receiving > Transfer Shipment. The Transfer Shipment List window opens.

To adjust the carrier, follow these steps:

1. Select the shipment for which you want to change the carrier. The Shipment Detail window opens.
2. Click **BOL** to open the BOL Detail window.

Figure 10–25 BOL Detail Window

The screenshot shows the 'BOL Detail Window' in a software application titled 'Store Inventory Management'. The window has a blue header with 'Back' and 'Adjust Carrier' buttons. Below the header, there are several sections:

- Shipment Summary:** Shipment ID: 4145, Create Date: 10/5/2015, Bill Of Lading ID: 4447, Dispatch Date: (empty).
- Additional:** Motive: Transfer (dropdown), Requested Pickup Date: (calendar icon), Tax ID: (input field).
- Ship From:** 1111 - Charlotte *, 123 Street, Anytown, Anycity, MN 50250.
- Ship To:** Address Type: Business Address (dropdown), 1131 - Jacksonville, 123 Street, Anytown, Anycity, MN 50250.
- Carrier:** Type: Receiver, Sender, Third Party; Carrier: DHL, FedEx, Other, UPS.
- Service:** Service: 2 Day, 3 Day, Express.
- Carrier Address:** Name: (input field).
- Containers Table:**

ID	Container ID	Weight (LBS)	Package Type	Tracking ID
4244	000000011310174093			
4321	000000011310178066			
4741	000000011310190064			
4742	000000011310190079			

At the bottom of the window, there are navigation buttons: Client Information, SIM User, 1111 - Charlotte *, BOL Detail, Help, and Jump.

3. Click **Adjust Carrier**. You are asked to confirm that you want to change the carrier. Click **Yes**. The carrier fields are opened for editing.

All containers move back to an In Progress state and are required to be reprocessed.

Figure 10–26 BOL Detail Window with Carrier Fields Open for Edit

Store Inventory Management

Save Cancel

Shipment Summary
 Shipment ID: 4145 Create Date: 10/5/2015
 Bill Of Lading ID: 4447 Dispatch Date:

Additional
 Motive: Transfer
 Requested Pickup Date:
 Tax ID:

Ship From
 1111 - Charlotte *
 123 Street
 Anytown
 Anycity, MN 50250

Ship To
 Address Type: Business Address
 1131 - Jacksonville
 123 Street
 Anytown
 Anycity, MN 50250

Carrier
 Type: Receiver, Sender, Third Party
 Carrier: DHL, FedEx, Other, UPSP

Service
 Service: 2 Day, 3 Day, Express

Carrier Address
 Name:

ID	Container ID	Weight (LBS)	Package Type	Tracking ID
4244	000000011310174093			
4321	000000011310178066			
4741	000000011310190064			
4742	000000011310190079			

Client Information SIM User 1111 - Charlotte * BOL Detail Help Jump

- Update the following fields as needed:
 - Motive** – The default value is Transfer. If needed, select a different value.
 - Carrier** – The provider that will handle the shipment. If Third-party is selected, select the provider. If Other is selected, enter the name and address.
 - Alternate Destination Address** – If the transfer is to be shipped to an address other than the address displayed (under Ship To), enter the full shipping address.
 - Requested Pickup Date** – Enter or select the date when you want the transfer picked up.
 - Service** – If third-party provider is selected, choose the service method for the shipment.
 - Carrier** – The provider that will handle the shipment. If Third-party is selected, select the provider. If Other is selected, enter the name and address.
- Click **Save**. You are returned to the Transfer Shipment Detail window.

Dispatch a Transfer Shipment

After you create a shipment, it must be dispatched before the actual transfer of goods will occur.

You can dispatch a shipment once all containers have been completed for the shipment.

For outbound transfers with In Progress status, you can also use the following procedure to dispatch transfers without viewing or editing them.

Note: You can dispatch a transfer only if its status is In Progress and it is outbound.

Navigate: Main Menu > Shipping/Receiving > Transfer Shipment. The Transfer Shipment List window opens.

1. If you want to limit the transfer list to show only the outbound transfers that you can dispatch, filter the list. See “[Filter the Transfer Shipment List.](#)”
2. For each transfer you want to dispatch:
 - a. Select the outgoing transfer with In Progress status that you want to dispatch. The Transfer Shipment Detail window opens.
 - b. Click **Dispatch**. You receive a prompt to verify that you want to dispatch the transfers now.
 - c. Click **Yes** to dispatch the selected shipments. You are returned to the Transfer Shipment List window.
3. Save or dispatch the shipment:
 - To save the shipment without dispatching it, click **Save**. The shipment is saved with a status of In Progress. To edit the shipment later, select the shipment in the Transfer Shipment List window.
 - To dispatch the shipment, click **Dispatch**. You receive a prompt to verify that you want to dispatch the transfer now. Click **Yes**.

Note: Submit will be available if system is configured as such. If it is configured to submit, you will only have a submit or a dispatch. You cannot have both at the same time. It will require that you submit in order to dispatch. Once you have a submit, you will be able to dispatch.

Delete a Transfer Shipment

The Delete Shipment option allows the user to delete an entire shipment. The status of both the shipment and all containers for the shipment is changed to Canceled.

Navigate: Main Menu > Shipping/Receiving > Transfer Shipment. The Transfer Shipment List window opens.

1. If you want to limit the transfer list to show only the outbound transfers that you can dispatch, filter the list. See “[Filter the Transfer Shipment List.](#)”
2. Select the shipment you want to delete. The Transfer Shipment Detail window opens.
3. Click **Delete Shipment**. You are prompted to confirm the deletion.
4. Click **Yes**. The status of the shipment is changed to Canceled. You are returned to the Transfer Shipment List window.

Create or Edit a Container

Note: To edit a container, double-click the container in the Transfer Shipment Detail window and begin with Step 2.

Navigate: Main Menu > Shipping/Receiving > Transfer Shipment. The Transfer Shipment List window opens.

To create a container, follow these steps:

1. To create a container, click **Create Container**. The Transfer Shipment Container Detail window opens.

Figure 10–27 Transfer Shipment Container Detail Window

Item	Description	Document	UOM	Pack Size	Inventory	Remaining	Quantity	UIN Qty
100200114	Mild Chicken:Brown:Gooseberry	4565	Cases	1	974	0	1	

2. To select the transfer documents for the container, see "[Select Transfer Documents for the Container](#)."
3. For each item you want to manually add to the transfer shipment, follow these steps:
 - a. Click **Add Item**. A row for the item is added.
 - b. In the **Item** field, enter the item number or click the **Ellipsis** button to look up the item.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Transfer Shipment Container Detail window. See "[Item Lookup](#)" in [Chapter 20](#) for more information, or click **Scanner** to scan the item. See "[Scan an Item \(Scanner Button\)](#)" in [Chapter 2](#) for more information.
 - c. For each item on the container, complete these fields:
UOM – From the drop-down list, select the unit of measure.
Requested – Enter the number of units requested.
4. To remove items from the transfer shipment, see "[Remove Items](#)".
5. To add extended attributes, see "[Enter Item Extended Attributes](#)".
6. To add the container, click **Save**. You are returned to the Transfer Shipment Detail window.

Select Transfer Documents for the Container

To select the transfer or allocation document to add to the container:

1. From the Transfer Shipment Container Detail window, click **Document**. The Document Selection window opens.

Figure 10–28 Document Selection Window

ID	External ID	Not After Date	Status	SKUs	Context Type	Context Value	Orders
4444		10/6/2015	Approved	1			No

Item ID	Description	Remaining Qty
---------	-------------	---------------

2. Select the Inventory Type:
 - Available - The selected document was created with the intent to ship items from currently available inventory.
 - Unavailable - The selected document was created with the intent to ship items from unavailable inventory. For example: product taken from shelf for a recall.
3. Select the Default Reason:
 - This drop down is only be made available when the transfer document include items from unavailable inventory.
 - The reason selected is used for each item when added into the container.
4. Select the Limit Items To:
 - You may set up a container to hold only items from a particular department, class, or subclass.
 - Select the merchandise hierarchy level you would like to limit items to.
 - Select None if all items are eligible to be placed in a container regardless of the merchandise hierarchy.
5. Select the Transfer or Allocation Document to add to the container.
6. Select one or more items to add to the container.
7. Update the document selection:
 - Click **Apply Item(s)** to add one or more selected items to the container without the corresponding quantity.
 - Click **Apply Item(s) & Quantity** to add one or more selected items and quantities to the container.

- Click **User Document** to select a transfer document. When adding items to the container, the items will be validated against the transfer document.
- Click **No Document** to clear the document selection. You are returned to the Transfer Shipment Detail window.
- Click **Close** to return to the Transfer Shipment Detail window.

Limit a Container by Merchandise Hierarchy

To select limit a container by merchandise hierarchy, follow these steps:

1. From the Transfer Shipment Container Detail window, click **Document**. The Document Selection window opens.
2. Select the part of the hierarchy from the Limit Items To drop-down list.
3. Click **Close**. You are returned to the Transfer Shipment Container Detail window.

Select Unavailable Inventory

To select unavailable inventory, follow these steps:

1. From the Transfer Shipment Container Detail window, click **Document**. The Document Selection window opens.
2. Select Unavailable in the Inventory Type drop-down list.
3. Click **Close**. You are returned to the Transfer Shipment Container Detail window.

Add Items without a Transfer

For each item you want to manually add to the transfer shipment, follow these steps:

1. In the Transfer Shipment Container Detail window, click **Add Item**. A row for the item is added.
2. In the **Item** field, enter the item number or click the **Ellipsis** button to look up the item.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Transfer Shipment Container Detail window. See [“Item Lookup” in Chapter 20](#) for more information, or click **Scanner** to scan the item. See [“Scan an Item \(Scanner Button\)” in Chapter 2](#) for more information.

3. For each item in the shipment, complete these fields:
 - UOM** – From the drop-down list, select the unit of measure.
 - Requested** – Enter the number of units requested.

Remove Items

To remove items from the transfer shipment, follow these steps:

1. Select the items you want to delete in the Transfer Shipment Container Detail window.
2. Click **Remove Item**. You receive the following prompt: “The selected line item(s) will be deleted. Do you want to continue?”
3. Click **Yes**. The items are removed from the container.

Enter Item Extended Attributes

To add extended attributes:

1. To update the Extended Attributes, select an item row and click **Ext. Attributes**. The Extended Attributes window opens. This window captures additional information about an item.

Figure 10–29 Extended Attributes Entry Window

Batch/Lot	Best Before	Origin	Sell By	Use By	Scan Qty
11110					2
458					2

Extended Attributes

Batch/Lot:

Best Before:

Origin:

Sell By:

Use By:

Apply Add Attributes Remove Attributes Cancel

Note: The Extended Attributes Entry window view may vary, depending upon customer chosen attributes.

2. Enter/select the field options.
3. Click **Add Attributes** to add the additional attributes to the item.
4. Click **Apply** to save the changes and return to the previous window.

Enter Item UINs

If unique identification numbers (UIN) are required for the items in a transfer shipment, the UINs must be scanned or entered manually when the transfer shipment is created. To enter UINs, see "[Updating UINs](#)."

Create a Container Label

Navigate: Main Menu > Shipping/Receiving > Transfer Shipment. The Transfer Shipment List window opens.

To create a container label, see the following sections:

- [Enter the Container ID, Tracking ID, Package Type, and Weight](#)
- [Print a Container Label](#)

Enter the Container ID, Tracking ID, Package Type, and Weight

1. Select the shipment for which you want to enter the container label information. The Transfer Shipment Detail window opens.
2. Select the container. The Transfer Shipment Container Detail window opens.
3. Click **Info**. The Container Info window opens.

Figure 10–30 Container Info Window

The screenshot shows a window titled "Container Info" with the following fields and values:

- ID: 4742
- Container ID: 000000011310190079
- Shipment ID: 4145
- Destination Type: Store
- Destination: 1131 Jacksonville
- Status: New
- Create Date: 10/15/2015
- Create User: SIM_User
- Last Update: 10/15/2015
- Last Update User: SIM_User
- Approval Date:
- Approval User:
- Container ID: 000000011310190079 (input field)
- Package Type: -Select- (dropdown menu)
- Weight (LBS): (input field)
- Tracking ID: (input field)
- Container Label: Transfer Shipping Label (dropdown menu)

Buttons at the bottom: Apply, Print Label, Cancel.

4. Select the label from the Container Label drop-down list.
5. Click **Apply**. You are returned to the Transfer Shipment Container Detail window.

Print a Container Label

To print a container label, follow these steps:

1. Select the shipment for which you want to enter the container label information. The Transfer Shipment Detail window opens.
2. Select the container. The Transfer Shipment Container Detail window opens.
3. Click **Info**. The Container Info window opens.
4. Select the label from the Container Label drop-down list.
5. Click **Print Label**. You are returned to the Transfer Shipment Container Detail window.

Confirm a Container

Confirming is done when the work on a container is completed. A container can only be confirmed when the status is In Progress. When the container is confirmed, any items with zero quantity are removed and the corresponding transfer documents are updated.

Navigate: Main Menu > Shipping/Receiving > Transfer Shipment. The Transfer Shipment List window opens.

To confirm a container, follow these steps:

1. Select the shipment. The Transfer Shipment Detail window opens.
2. Select the container. The Transfer Shipment Container Detail window opens.

3. Click **Confirm**. The status is changed to Complete. If manifesting is used, the web service call is made at this time and the Tracking ID is updated into the container info screen.
4. Click **Save**. You are returned to the Transfer Shipment List window.

Adjust a Completed Container

A container in Completed status can be reopened.

Navigate: Main Menu > Shipping/Receiving > Transfer Shipment. The Transfer Shipment List window opens.

To adjust a completed container, follow these steps:

1. Select the shipment. The Transfer Shipment Detail window opens.
2. Select the container. The Transfer Shipment Container Detail window opens.
3. Click **Adjust**. You are prompted to confirm that you want to reopen the container.
4. Click **Yes**. The status changes to In Progress.
5. Click **Save**. You are returned to the Transfer Shipment List window.

Delete a Container

Navigate: Main Menu > Shipping/Receiving > Transfer Shipment. The Transfer Shipment List window opens.

To delete a container, follow these steps:

1. Select the shipment. The Transfer Shipment Detail window opens.
2. Select the container. The Transfer Shipment Container Detail window opens.
3. Click **Delete**. You are prompted to confirm the delete.
4. Click **Yes**. The status changes to Canceled.
5. Click **Save**. You are returned to the Transfer Shipment List window.

Transfer Receiving

Transfer Receiving List

Navigate: Main Menu > Shipping/Receiving > Transfer Receiving. The Transfer Receiving List window opens.

Figure 10–31 Transfer Receiving List Window

ID	ASN	Source Type	Source	Expected Date	Received Date	Status	Containers	Missing	Total SKUs	Customer Order
643	1103	Store	1131 : Jacksonville	8/5/2015		In Progress	9	✓	2	
1345	2065	Store	1131 : Jacksonville	8/20/2015		In Progress	11		4	
1522	2281	Store	692951858 : ALL...	8/25/2015		In Progress	2		2	
1626	2388	Store	1131 : Jacksonville	8/26/2015		In Progress	7		6	
1665	2404	Store	1131 : Jacksonville	8/26/2015		In Progress	2		4	
2004	2523	Store	1131 : Jacksonville	8/27/2015		In Progress	5	✓	3	✓
2202	2741	Store	1131 : Jacksonville	9/1/2015		In Progress	2	✓	1	
2203	2742	Store	1131 : Jacksonville	9/1/2015		New	1	✓	1	
3388	3860	Store	1131 : Jacksonville	9/24/2015		In Progress	2		1	
443	863	Store	1131 : Jacksonville	7/31/2015		In Progress	4		4	
503	925	Store	1211 : Boston	8/3/2015		In Progress	8		5	
1143	ASN_1143	Warehouse	2 : N. America C...	8/10/2015		In Progress	1		2	

The Transfer Receiving List window displays the following information about received transfers:

Column	Description
ID	SIM identifier for the delivery
ASN	Advanced Shipment Notice number
Source Type	Type of location sending the goods
Source	ID and name of the sending location
Expected Date	Expected date of the delivery
Received Date	Date the delivery was received
Status	Current status of the delivery: <ul style="list-style-type: none"> ■ Canceled ■ In Progress ■ New ■ Received
Containers	Total number of containers for the delivery
Missing	Indicates whether or not there are one or more missing containers
Total SKUs	The sum of unique items for all containers
Customer Order	Indicates if any items are part of a customer order or not

From the Transfer Receiving List window, you can do the following:

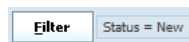
- [Filter the Transfer Receiving List](#)
- [Create or Edit a Transfer Receipt](#)
- [Receive Unexpected Containers](#)
- [View Customer Order Information in the Delivery](#)

- [Confirm a Transfer Receipt](#)
- [Delete a Transfer Receipt](#)
- [Print a Transfer Receipt](#)
- [Edit a Container](#)
- [Damage an Item](#)
- [Confirm a Container](#)
- [Adjust a Received Container](#)
- [Delete a Container](#)
- [Print a Discrepant Item Report](#)

From the Transfer Receiving List window, click **Back** to return to the Shipping/Receiving menu.

Filter the Transfer Receiving List

Whenever a list window is displayed, you can filter the list of transfers to limit the transfers listed. If the list is currently filtered, the filtering is shown next to the Filter button.



To filter the list of transfers or to change the current filtering, follow these steps:

1. In the Transfer Receiving List window, click **Filter**. The Transfer Receiving List Filter window opens.

Figure 10–32 Transfer Receiving List Filter Window

2. Enter or select search values as needed to specify the deliveries you want to list. All values are optional. If you leave a field blank or select All, every value is included in the search.

Expected Date Filters – Enter or select From Date and To Date values to limit the date range of the expected arrival date.

Received Date Filters – Enter or select From Date and To Date values to limit the date range of the received date.

Source Filter – Select a source type. If a value other than All is selected for the type, enter the source location to select all transfers from that location. The type may include warehouse, store, or finisher.

ASN – Enter the ASN for the delivery.

Container ID – Enter a container identifier for a delivery.

Item – Enter the Item ID or click the **Ellipsis** button to look up an item.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Transfer Receiving List Filter window. See “[Item Lookup](#)” in [Chapter 20](#) for more information.

Status – Select a status from the drop-down list. The default is Active. Active status selects deliveries in New and In Progress status.

Document ID – Enter the document identifying number to limit the search for deliveries with the items from the selected document.

Customer Order ID – Enter the customer order number to search for a specific customer order.

Fulfillment Order ID– Enter the fulfillment order number to search for a specific fulfillment order.

Customer Orders – Select this check box if you want to search for customer orders on deliveries only.

Context Type – If related to a promotion or repair, select the context type to limit the results returned. For example, select “Promotion” to limit the delivery results with promotions.

Context Value – If the transfer is related to a promotion, enter a promotion ID or click the **Ellipsis** button to look up a promotion. See “[Look Up a Promotion](#)” for more information.

3. Click **Apply**. You return to the Transfer Receiving List window, where your filter has been applied.

Look Up a Promotion

You can look up a promotion when you are filtering the list.

In the Context Type field, select Promotion. If you click the **Ellipsis** button on the Context Value field, the Promotion Lookup window opens.

Figure 10–33 Promotion Lookup Window

The screenshot shows a window titled "Promotion Lookup". At the top, there are three input fields: "Promotion ID:" followed by a blue ellipsis button, "Promotion Name:", and "Search Limit:" with the value "500". Below these fields is a table with two columns: "Promotion ID" and "Promotion Name". The table is currently empty. At the bottom of the window are four buttons: "Search", "Apply", "Reset", and "Cancel".

To look up a promotion ID for a transfer:

1. Enter any of the following optional values to limit promotion search results:

Promotion ID – If you want to limit the search to a particular promotion ID, enter that identifier.

Promotion Name – If you want to search on the promotion name, enter a string of characters found in the promotion name.

Search Limit – If you want to change the maximum number of promotions returned from the search, enter an integer value. The default value is 500.

2. Select the promotion you want to use for the transfer.
3. Click **Apply** to return to the Transfer Receiving List window.

Look Up a Customer Order

You can look up a specific customer order when you are filtering the list.

To look up a customer order, follow these steps:

1. In the Transfer Filters section, enter the Customer Order ID provided by the order management system.
2. Click **Apply** to return to the Transfer Receiving List window.

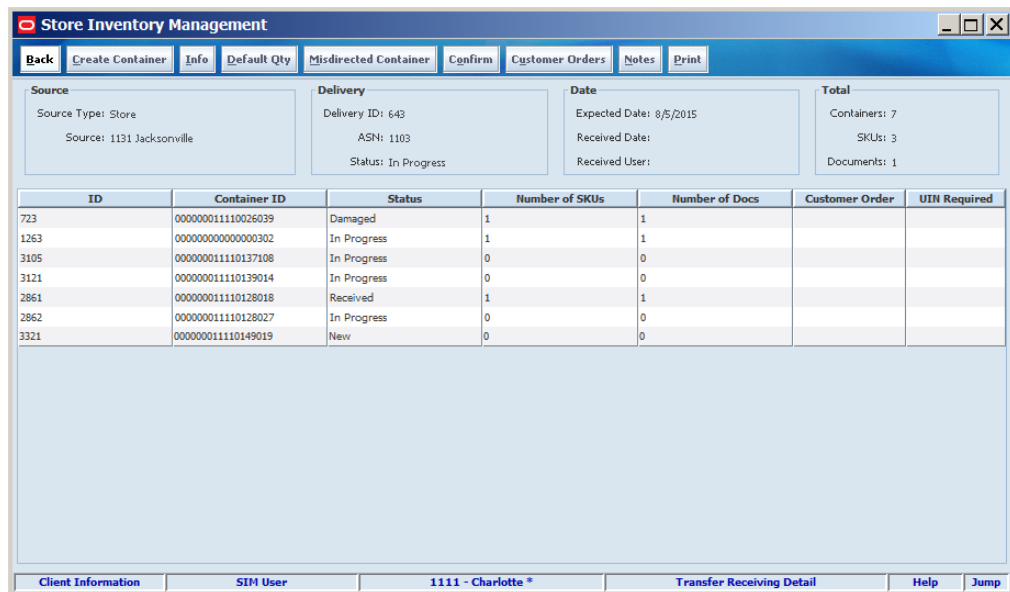
Create or Edit a Transfer Receipt

Navigate: Main Menu > Shipping/Receiving > Transfer Receiving. The Transfer Receiving List window opens.

To receive a delivery, follow these steps:

1. If you want to limit the Transfer Receiving List to show only the inbound transfers that you can receive, filter the list. See "[Filter the Transfer Receiving List.](#)"
2. Select the delivery you want to receive. The Transfer Receiving Detail window opens.

Figure 10–34 Transfer Receiving Detail Window



3. To receive all items in all containers within the delivery, click **Default Qty**.
4. To add or remove items from the receipt, see "[Create or Edit a Container.](#)"

5. A container that ends up at the wrong location, but is received in that location, is considered to be a misdirected container. To receive a misdirected container, see "[Receive Unexpected Containers](#)."
6. To complete the transfer receipt, see "[Confirm a Transfer Receipt](#)".

You are returned to the Transfer Receiving List window.

Default Quantities on All Containers

The user can receive all the items in the delivery by defaulting the expected quantity to the received quantity. To receive all items for all containers, click **Default Qty** in the Transfer Receiving Detail window.

Identify the Carrier Details

The carrier details can be edited until the receipt is closed.

To identify the carrier, follow these steps:

1. In the Transfer Receiving Detail window, click **Info**. The Transfer Receiving Info window opens.

Figure 10–35 Transfer Receiving Info Window

2. Complete the carrier information:

Carrier Entity – Enter the name of the carrier.

Carrier Type – Select the type of carrier from the drop-down list.

Carrier Code – If the Carrier Type is Third Party, enter the Standard Carrier Alpha Code (4 letter code).

License Plate – Enter the license plate of the carrier's truck.

From Address – Enter the address from where the delivery came.

Freight ID – Enter the freight code.

3. Click **Save**. You are returned to the Transfer Receiving Detail window.

Receive Unexpected Containers

A container that ends up at the wrong location, but is received in that location, is considered to be a misdirected container. The user can receive a container that was not intended for the user's destination, but the business requires them to receive it.

The unexpected container can be handled in two ways:

- [Create an Empty Container](#)
- [Copy a Misdirected Container](#)

Create an Empty Container

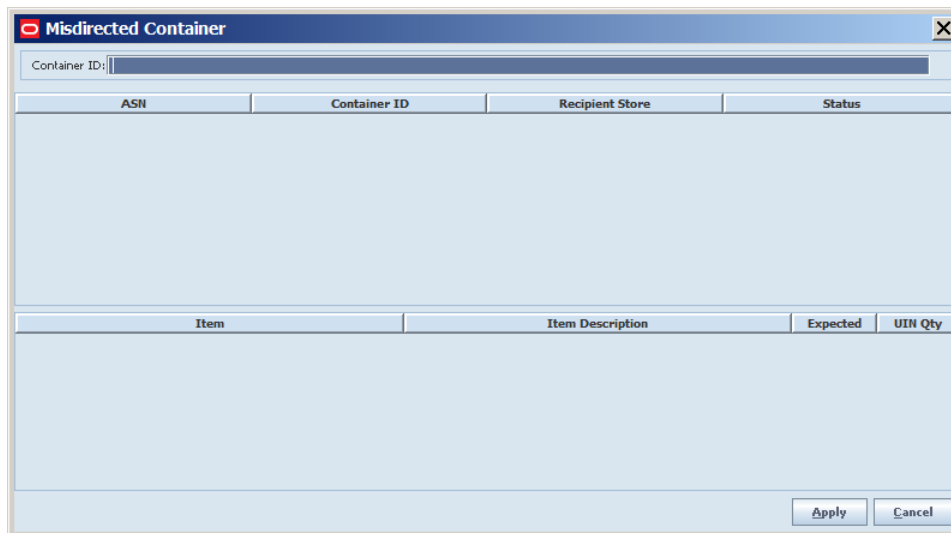
To create a container on the fly, click **Create Container**. A new container is created. The Transfer Receiving Container Detail window opens. For information on setting up the container, see "[Edit a Container](#)."

Copy a Misdirected Container

To copy a misdirected container, follow these steps:

1. Click **Misdirected Container**. The Misdirected Container window opens.

Figure 10–36 *Misdirected Container Window*



2. Enter the Container ID to be copied.
3. Click the Container to view the items within the container. In some cases, there may be more than one container with the same container ID. You can view the contents to correctly identify the container to copy.
4. Click **Apply**. The contents are copied to the new container within the delivery you are currently working in. You are returned to the Transfer Receiving Detail window, where you can now receive the container in the same manner.

View Customer Order Information in the Delivery

In the Transfer Receiving Detail window, a yes, no or mix check value displays in the Customer Order column. This indicates if a shipment includes customer orders. The

value of yes means all items in the container are for a customer order. If the value is mix, there are some items in the container for a customer order and some items that do not belong to a customer order and may need the container set aside for additional processing to separate the items. The customer order information related to the shipment can be viewed.

To view the customer order information, follow these steps:

1. Select a container and click **Customer Orders**. The Customer Order Information window opens.

The following information is displayed:

Customer Order ID – ID assigned to this delivery.

Fulfillment ID – Fulfillment ID provided by the order management system.

ID – Container ID assigned by the system.

Container ID – Shipping container number which represents the barcode number for the container within the shipment.

Status – Current status of the order.

Total SKUs – Total number of line items for the fulfillment order within the container.

Comments – Comments, if available.

2. When you are done viewing the information, click **Close**.

Confirm a Transfer Receipt

To complete the transfer receipt, the receipt is confirmed. Any container not identified as Received is marked as Missing.

Navigate: Main Menu > Shipping/Receiving > Transfer Receiving. The Transfer Receiving List window opens.

To confirm a transfer receipt, follow these steps:

1. Select the receipt. The Transfer Receiving Detail window opens.
2. To confirm any containers in the transfer, see "[Confirm a Container](#)".
3. Click **Confirm**. You are prompted to confirm.
4. Click **Yes**. The status is changed to Received.
5. Click **Back**. You are returned to the Transfer Receiving List window.

Delete a Transfer Receipt

You are unable to delete a transfer receipt. A transfer document may be associated with multiple shipments and deliveries. Since the receipt is associated with transfers, deleting the transfer receipt is handled with purging of the transfer document and transfer shipment batch program. The purge parameter determines how long closed documents, shipments and receipts remain in the system.

Print a Transfer Receipt

To print a transfer receipt, follow these steps:

1. Select the transfer receipt you want to print.

2. Click **Print**. The Report Selection window opens.
3. Select the report type and printer.
4. Click **Apply**. The report prints. You are returned to the Transfer Receiving List window.

Edit a Container

Navigate: Main Menu > Shipping/Receiving > Transfer Receiving. The Transfer Receiving List window opens.

To edit a container, follow these steps:

1. Select the receipt with the container you want to edit. The Transfer Receiving Detail window opens.
2. Select the container. The Transfer Receiving Container Detail window opens.

Figure 10–37 Transfer Receiving Container Detail

The screenshot shows the 'Store Inventory Management' application window. The title bar includes 'Store Inventory Management' and standard window controls. Below the title bar is a menu bar with buttons: Save, Info, Add/Scan Item, Remove Item, Default Qty, Clear Qty, Confirm, Delete, Notes, Print, Egt. Attributes, and Cancel.

The main content area is divided into four sections:

- Container:** ID: 1263, Container ID: 00000000000000302, ASN: 1103, Source Type: Store, Source: 1131 Jacksonville, Customer Orders: No.
- Document:** Receipt ID: 643, Status: In Progress, Reference Container: (empty), Display Only Discrepancies:
- Date:** Expected Date: 8/5/2015, Received Date: (empty), Received User: (empty)
- Totals:** UOM: Cases (dropdown), Total SKUs: 1, Expected Qty: 10, Total Qty: 10

Below these sections is a table with the following columns: Item, Item Description, UOM, Pack Size, Expected, Received, Damaged, and UIN Qty.

Item	Item Description	UOM	Pack Size	Expected	Received	Damaged	UIN Qty
100000462	Test Item 100000462	Cases	10	10	10	0	

At the bottom of the window is a status bar with the following information: Client Information, SIM User, 1111 - Charlotte *, Transfer Receiving Container Detail, Help, and Jump.

3. For information on making changes, see the following sections:
 - [Add an Unexpected Item](#)
 - [Default all Item Quantities](#)
 - [Clear all Item Quantities](#)
 - [Remove an Item](#)
 - [Correct a Discrepant Item](#)
 - [Record the Container Reference Number](#)
 - [Move Inventory to the Shop Floor](#)
 - [Enter the Tracking ID and SSCC Barcode](#)
 - [Enter Item Extended Attributes](#)
 - [Enter Item UINs](#)

4. Click **Save**. You are returned to the Transfer Receiving Detail window.

Add an Unexpected Item

To add an item to the transfer, follow these steps:

1. Select the container. The Transfer Receiving Container window opens.
2. Click **Add/Scan Item**. The Advanced Item Entry window opens.

Figure 10–38 Advanced Item Entry Window

Attribute	Value

3. In the **Item** field, enter the item number or click the **Ellipsis** button to look up the item.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Transfer Request window. See “[Item Lookup](#)” in [Chapter 20](#) for more information, or scan the item. See “[Scan an Item \(Scanner Button\)](#)” in [Chapter 2](#) for more information.

4. Enter the received and/or damaged quantity to receive along with the case size.
5. Click **Apply**. The item is added to the container.

Default all Item Quantities

You can default all the received quantities with the expected quantity for each item in the delivery. To default all the item quantities:

1. Click **Default Qty**. You are prompted to confirm the change.
2. Click **Yes**. The received quantity column is updated.

Clear all Item Quantities

You can revert all items in the container by replacing the received and damaged fields with a zero. To clear all the quantities:

1. Click **Clear Qty**. You are prompted to confirm the change.
2. Click **Yes**. The received and damage quantity columns are set to zero.

Remove an Item

To remove an item from the transfer, follow these steps:

1. Select the container. The Transfer Receiving Container Detail window opens.
2. Select the item to be removed.
3. Click **Remove Item**. You are prompted to confirm the removal.
4. Click **Yes**. The item is removed.

Correct a Discrepant Item

You can print a discrepant item report to identify items with a discrepancy and also easily identify and correct discrepant items on the screen, (received plus damaged does not equal expected). To correct a discrepant item, follow these steps:

1. Select the container. The Transfer Receiving Container Detail window opens.
 2. Click in the Display Only Discrepancies in the Document section of the window.
2. Click Display Only Discrepancies in the Document section of the window.
3. The display refreshes and only items with a discrepancy are displayed allowing you to review and update these items easily.
4. Click **Save**. You are returned to the Transfer Receiving Detail window.

Record the Container Reference Number

This field holds an external reference container number, for example, the container number assigned to another store but received in the current store. If the container was not found when searching for a misdirected container, you can add an empty container and record the original container ID from the container label.

To record the container reference number, follow these steps:

1. Select the newly created container. The Transfer Receiving Container window opens.
2. Click **Info**. The Transfer Receiving Container Info window opens.

Figure 10-39 Transfer Receiving Container Info Window

Transfer Receiving Container Info

ID: 2546
 Container ID: 00000000000001206
 ASN: 2065
 Source Type: Store
 Source: 1131 Jacksonville
 Status: New
 Adjusted Container:
 Reference Container:

Expected Date: 8/20/2015
 Create Date: 9/3/2015
 Create User: dev
 Last Update: 9/3/2015
 Last Update User: dev
 Received Date:
 Received User:

Receive on Shopfloor:
 Damage Remaining:
 Damage Reason:
 SSCC:
 Tracking ID:

Apply **Cancel**

3. Enter the reference number into the Reference Container field.
4. Click **Apply**. You are returned to the Transfer Receiving Container window.

Move Inventory to the Shop Floor

To move inventory to the shop floor, follow these steps:

1. Select the container. The Transfer Receiving Container window opens.
2. Click **Info**. The Transfer Receiving Container Info window opens.
3. Check the Receive on Shopfloor box.
4. Click **Apply**. You are returned to the Transfer Receiving Container window.

Enter the Tracking ID and SSCC Barcode

To enter tracking ID and SSCC barcode, follow these steps:

1. Select the container. The Transfer Receiving Container window opens.
2. Click **Info**. The Transfer Receiving Container Info window opens.
3. Enter the values into the Tracking ID and SSCC fields.
4. Click **Apply**. You are returned to the Transfer Receiving Container window.

Enter Item Extended Attributes

To add extended attributes:

1. Select an item row and click **Ext. Attributes**. The Extended Attributes window opens. This window captures additional information about an item.

Figure 10–40 Extended Attributes Entry Window

Batch/Lot	Best Before	Origin	Sell By	Use By	Scan Qty
11110					2
458					2

Extended Attributes

Batch/Lot:

Best Before:

Origin:

Sell By:

Use By:

Apply Add Attributes Remove Attributes Cancel

Note: The Extended Attributes Entry window view may vary, depending upon customer chosen attributes.

2. Enter/select the field options.
3. Click **Add Attributes** to add the additional attributes to the item.
4. Click **Apply** to save the changes and return to the previous window.

Enter Item UINs

If unique identification numbers (UIN) are required for the items in a transfer, the UINs must be scanned or entered manually when the transfer is received. To enter UINs, see "[Updating UINs](#)".

Damage an Item

Navigate: Main Menu > Shipping/Receiving > Transfer Receiving. The Transfer Receiving List window opens.

Enter the Damage Quantity

To enter the damage quantity, follow these steps:

1. Select the receipt. The Transfer Receiving Detail window opens.
2. Select the container. The Transfer Receiving Container Detail window opens.
3. Select the item.
4. Enter the damage quantity in the Damaged column.
5. Click **Save**. You are returned to the Transfer Receiving List window.

Default the Damage Quantity for the Remaining Items

To enter the remaining quantity as damaged, follow these steps:

1. Select the container. The Transfer Receiving Container Detail window opens.

2. Click **Info**. The Transfer Receiving Container Info window opens.
3. Click the Damage Remaining checkbox.
4. Click **Apply**. You are returned to the Transfer Receiving Container Detail window.

Enter a Damage Reason Code

To enter a damage reason code, follow these steps:

1. Select the receipt. The Transfer Receiving Detail window opens.
2. Select the container. The Transfer Receiving Container Detail window opens.
3. Click **Info**. The Transfer Receiving Container Info window opens.
4. Select the reason for the damage.
5. Click **Apply**. You are returned to the Transfer Receiving Container Detail window.

Confirm a Container

Navigate: Main Menu > Shipping/Receiving > Transfer Receiving. The Transfer Receiving List window opens.

To confirm a container, follow these steps:

1. Select the receipt. The Transfer Receiving Detail window opens.
2. Select the container. The Transfer Receiving Container Detail window opens.
3. Click **Confirm**. You are prompted to confirm.
4. Click **Yes**. The status is changed to Received.
5. Click **Save**. You are returned to the Transfer Receiving List window.

Adjust a Received Container

A container in Received status can be reopened.

Navigate: Main Menu > Shipping/Receiving > Transfer Shipment. The Transfer Receiving List window opens.

To adjust a received container, follow these steps:

1. Select the receipt. The Transfer Receiving Detail window opens.
2. Select the container. The Transfer Receiving Container Detail window opens.
3. Click **Adjust**. You are prompted to confirm that you want to reopen the container.
4. Click **Yes**. The status changes to In Progress.
5. Click **Save**. You are returned to the Transfer Receiving List window.

Delete a Container

Navigate: Main Menu > Shipping/Receiving > Transfer Receiving. The Transfer Receiving List window opens.

To delete a container, follow these steps:

1. Select the receipt. The Transfer Receiving Detail window opens.
2. Select the container. The Transfer Receiving Container Detail window opens.
3. Click **Delete**. You are prompted to confirm the delete.

4. Click **Yes**. The status changes to Canceled.
5. Click **Save**. You are returned to the Transfer Receiving List window.

Print a Discrepant Item Report

To print a Discrepant Item report, follow these steps:

1. Select the transfer receipt you want to print.
2. Click **Print**. The Report Selection window opens.
3. Select the report type and printer.
4. Click **Apply**. The report prints. You are returned to the Transfer Receiving List window.

Return to Vendor

You can create a new return or view/edit an existing Return to Vendor (RTV). You can create, edit, and dispatch returns from the store directly to a vendor. If there is unavailable stock for a returned item, you have the option to use items from unavailable stock for the return. A completed (shipped) return decreases available/unavailable stock on hand.

You can also prepare and print a bill of lading (transport document) to accompany a return.

The RTV document indicates the intention of the shipment. External merchandising systems can create the RTV document which needs to be approved in SIM. The RTV document can also be created within SIM. At approval time, the RTV document updates the reserved quantities in the store.

The RTV shipment enables multiple users to prepare containers for shipping together to the vendor. The shipping document is separate from the RTV request and approval document. An RTV shipment can be created without an RTV document/request being created. Only a single RTV document can be associated to a single RTV shipment. Unavailable and available can be mixed in the same container. This facilitates shipping out of inventory, since the retailer does not have to be concerned about post-processing.

This chapter covers the following buttons on the Main Menu:

- [RTV](#)
- [RTV Shipment](#)

RTV

RTV List Window

Navigate: Main Menu > Shipping/Receiving > RTV. The RTV List window opens. The RTVs associated to the user's location are listed.

Figure 11–1 RTV List Window

RTV ID	External Id	Authorization	Supplier	Not After Date	Status	Total SKUs
743		43	281731884 - RMS_ITEM_S...	6/24/2015	In Shipping	1
761		1863	115868815 - RMS_ITEM_S...	6/24/2015	RTV In Progress	1
762		fff	115868815 - RMS_ITEM_S...	6/24/2015	RTV In Progress	0
781		455	115868815 - RMS_ITEM_S...	6/24/2015	RTV In Progress	1
782		344	115868815 - RMS_ITEM_S...	6/25/2015	RTV In Progress	0
801			281731884 - RMS_ITEM_S...	6/25/2015	RTV In Progress	0
802			115868815 - RMS_ITEM_S...	6/25/2015	RTV In Progress	0
804			115868815 - RMS_ITEM_S...	6/23/2015	RTV In Progress	1
806		111	281731884 - RMS_ITEM_S...	6/25/2015	In Shipping	1
821		9433	281731884 - RMS_ITEM_S...	6/25/2015	In Shipping	3
841			115868815 - RMS_ITEM_S...	6/25/2015	RTV In Progress	0
881			281731884 - RMS_ITEM_S...		RTV In Progress	0
882			281731884 - RMS_ITEM_S...		RTV In Progress	0
901			115868815 - RMS_ITEM_S...		RTV In Progress	0
903			115868815 - RMS_ITEM_S...	6/26/2015	In Shipping	2
908			281731884 - RMS_ITEM_S...	6/27/2015	In Shipping	1
1026		222	115868815 - RMS_ITEM_S...	7/1/2015	In Shipping	1
1141	25620168	12345	281731884 - RMS_ITEM_S...	7/30/2015	In Shipping	2
1221		234	115868815 - RMS_ITEM_S...	7/29/2015	In Shipping	2
1301		12222	281731884 - RMS_ITEM_S...	8/2/2015	In Shipping	0
1302		12222	281731884 - RMS_ITEM_S...	8/2/2015	In Shipping	1
1303		12222	281731884 - RMS_ITEM_S...	8/2/2015	In Shipping	1
1304		1433	281731884 - RMS_ITEM_S...	8/2/2015	In Shipping	2
1305			115868815 - RMS_ITEM_S...	8/2/2015	In Shipping	0
1321		14334	281731884 - RMS_ITEM_S...	8/2/2015	In Shipping	1
1322			115868815 - RMS_ITEM_S...	8/2/2015	In Shipping	0

The RTV List window displays the following information about returns:

Column	Description
RTV ID	SIM identifier for the return
External ID	Identifier supplied by an external system
Authorization	Authorization number, if required for returns
Supplier	ID and name of the Supplier
Not After Date	Date after which an RTV document cannot be dispatched
Status	Current status of the return: <ul style="list-style-type: none"> ■ RTV In Progress – The request is being worked on, but it is not yet approved. It has been saved. ■ Requested – Return request was received from the merchandising system, but not yet processed by a SIM user. ■ Request in Progress – Return request received from the merchandising system is being worked on. ■ Rejected – RTV request was rejected and information sent back to the merchandising system. ■ Approved – The RTV is ready to be shipped. ■ Canceled Request – The return request was cancelled. ■ Canceled RTV – The return request was cancelled. It was cancelled from a shipment or after approval. ■ In Shipping – The RTV has a shipment against it with at least a one container saved or confirmed. ■ Completed – RTV is shipped.
Total SKUs	Total number of SKUs in the RTV document

From the RTV List window, you can do the following:

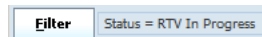
- [Filter the RTV List](#)
- [Create an RTV](#)
- [Edit or View an RTV](#)
- [Print a Return Report](#)
- [Delete an RTV](#)

From the RTV List window, click **Back** to return to the Shipping/Receiving menu.

Filter the RTV List

At any time while the RTV List window is open, you can click **Filter** to change how the list is filtered.

Current filtering is displayed next to the Filter button. If no filtering is displayed, all items are currently selected and listed.



To change how the list is filtered:

1. Click **Filter**. The RTV List Filter window opens.

Figure 11–2 RTV List Filter Window

2. If you want to reset all filtering criteria to the default values, click **Reset**.
3. Enter or select filtering criteria as needed to select just the RTVs you want to list. All criteria are optional. If you leave a field blank or select All, all values will be included in your filtering selection.

RTV ID – Enter the complete number generated by SIM for the return.

RTV External Id – Enter the external identifier of the return (supplied by an external system) to locate a particular return.

Auth Number – Enter the complete authorization number of the return.

Supplier – Use this field to select returns to a supplier. Enter or look up the Supplier ID.

In the Supplier Lookup window, locate and select the supplier you want. Click **Apply** to return to the List Filter window. See “[Supplier Lookup](#)” in [Chapter 20](#) for more information.

Item – Enter or look up the Item ID.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Item Request Filter window. See “[Item Lookup](#)” in [Chapter 20](#) for more information.

Status – Select a status from the drop-down list. The default is Active.

Reason – Select a reason from the drop-down list.

4. Click **Apply**. The results that match your search criteria are displayed in the RTV List window.

Create an RTV

Create an RTV to return items to a supplier. Unavailable or available stock may need to have a return created.

Navigate: Main Menu > Shipping/Receiving > RTV. The RTV List window opens.

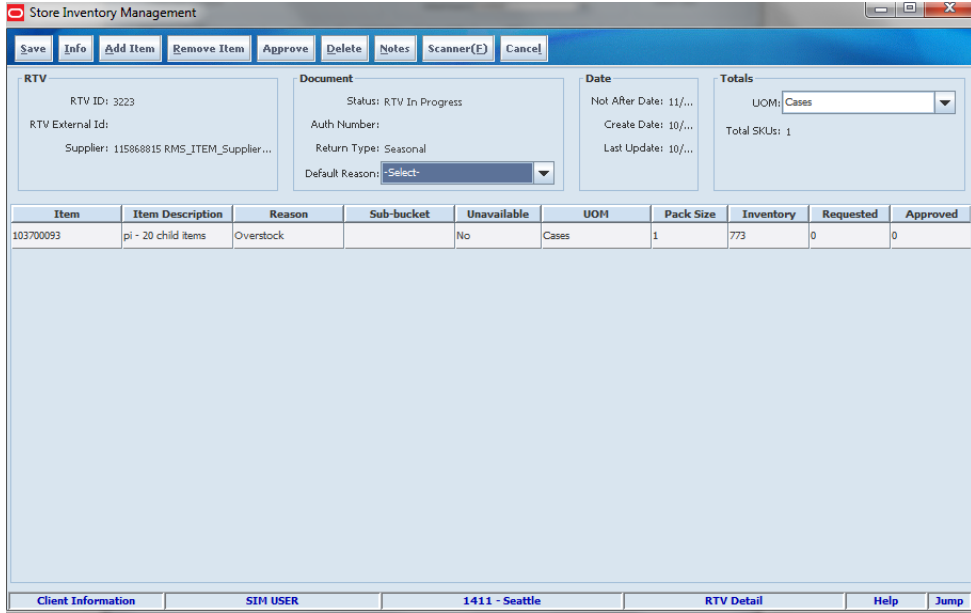
To create a return, follow these steps:

1. Click **Create**. The RTV Create window opens.

Figure 11–3 RTV Create Window

2. Enter the details on the return:
 - a. In the **Supplier** field, enter a supplier or click the **Ellipsis** button to look up a supplier. See “[Supplier Lookup](#)” in [Chapter 20](#) for more information.
 - b. In the **Not After Date** field, enter the date or use the Calendar button to select a date. When the selected date is reached, the RTV can no longer be shipped.
 - c. In the **Auth Number** field, enter the authorization number to help you track the return.
 - d. In the **Return Type** field, select the return type from the drop-down list.
3. Click **Apply**. The RTV Detail window opens.

Figure 11–4 RTV Detail Window



4. To add an item, click **Add Item**, or click **Scanner** to scan the item. See “Scan an Item (Scanner Button)” in Chapter 2 for more information.
5. For each item that you want to add to the return:
 - a. In the **Item** field, enter the item ID, or click the **Ellipsis** button to look up the item. See “Item Lookup” in Chapter 20 for more information. or click Scanner to scan the item. See “Scan an Item (Scanner Button)” in Chapter 2.
 - b. Update the following fields as needed:

Unit of Measure – Select the UOM from the drop-down list.

Default Reason – Select the default reason for which you are returning the items from the drop-down list.

Note: These are only displayed for reason codes with an inventory status to take inventory from unavailable stock. Will display only if the system is configured for sub-buckets.

Reason – If you do want to use the default reason for an item, select the reason that you are returning the item from the Reason drop-down list.

Sub-bucket – Displays what is associated with the reason code.

Unavailable – Will display a Yes if the reason has an inventory status for unavailable stock. Will display a No if the reason has an inventory status for available stock.

UOM – From the quantity of items, expressed in the drop-down list, select the selected unit of measure, that you are returning.

UIN Qty – If an item requires unique identification numbers (UIN), this field displays the number of items for which UINs have been scanned or entered. See “Update UINs for a Return.”

Approved – Based on the selected unit of measure, enter the number you approve for return.

- c. If you want to add another item, click **Add Item**. A new blank line is displayed. Or click **Scanner** to scan the item. See “[Scan an Item \(Scanner Button\)](#)” in [Chapter 2](#) for more information.
6. Click **Info**. The RTV Info window opens.

Figure 11–5 RTV Info Window

- a. Complete the fields that are enabled:
 - Not After Date** – Enter or select the date after which the return request cannot be dispatched.
 - Auth Number** – Enter the authorization number for the return.
 - b. Click **Save**. You return to the RTV Detail window.
7. To enter any additional information, click **Notes**. The RTV Notes window opens. For each note, enter your information and click **Save**. When you have finishing entering notes, click **Apply**.
 8. Save or approve the RTV:
 - a. Click **Save** to save the information that you entered so you can update or approve the RTV at a later time. You return to the RTV List window.
 - b. Click **Approve** to approve the RTV. You return to the RTV List window.

Edit or View an RTV

You can view any RTV record, and you can update in-progress returns when necessary.

Navigate: Main Menu > Shipping/Receiving > RTV. The RTV List window opens.

To edit or view a return, follow these steps:

1. If you want to limit which RTVs are listed, filter the list. See “[Filter the RTV List.](#)”
2. Select the RTV that you want to edit or view. The RTV Detail window opens.
3. Update enabled fields as needed:

Sub-bucket – The sub-bucket will display what is associated with the reason code.

Note: These are only displayed for reason codes with an inventory status to take inventory from unavailable stock. This will display only if the system is configured for sub-buckets.

Unit of Measure – From the drop-down list, select the UOM.

Default Reason – Select the default reason why you are returning the items from the Default Reason drop-down.

Reason – Select the reason that you are returning a specific item from the Reason drop-down.

UIN Qty – Update UINs for the return as needed. See [“Update UINs for a Return.”](#)

4. Add or remove items as needed. See [“Create an RTV”](#) for more information about adding and deleting return items.
5. If needed, update bill of lading (BOL) information. See [“Create an RTV Shipment”](#) for more information about updating BOL information.
6. To submit the return, click **Submit**. You receive a prompt to verify that you want to submit the return now. Click **Yes**.
7. To dispatch the return immediately, click **Dispatch**. You receive a prompt to verify that you want to dispatch the return now. Click **Yes**. For more information about dispatching a return, see [“Dispatch a Return.”](#)

Note: Submit will be available if system is configured as such. If it is configured to submit, you will only have a submit or a dispatch. You cannot have both at the same time. It will require that you submit in order to dispatch. Once you submit, then you will be able to dispatch.

If you do not want to dispatch the return, click **Save**. The return is saved until it is dispatched. You return to the RTV List window.

Update UINs for a Return

If unique identification numbers (UIN) are required for the items in a return, the UINs must be scanned or entered manually.

To enter UINs for the delivery, see [“Updating UINs”](#).

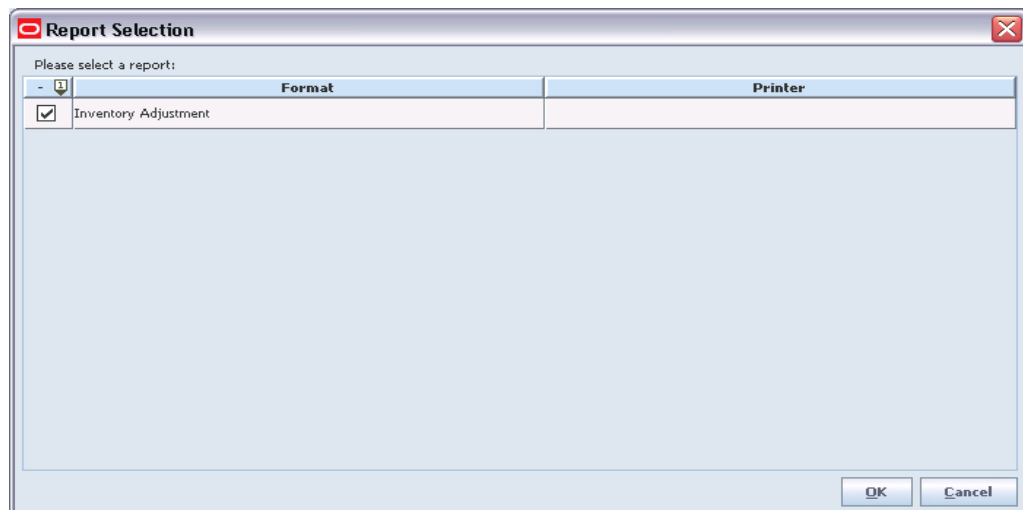
Print a Return Report

You can view or print a return report.

Navigate: Main Menu > Shipping/Receiving > RTV. The RTV List window opens.

To print one or more return reports, follow these steps:

1. Select the returns for which you want to print reports.
2. Click **Print**. The Report Selection window opens.



3. In the **Printer** field, double-click and select the printer or other output device for the report.
(See “[Print or View SIM Reports and Other Output](#)” in [Chapter 2](#) for general information about SIM report output.)
4. Click **OK**. You receive a message that the report was printed.
5. Click **OK** to return.

Delete an RTV

Delete a return record if you are cancelling the RTV.

Note: You can delete an RTV only if it has not been approved.

Navigate: Main Menu > Shipping/Receiving > RTV. The RTV List window opens.

To delete a return:

1. Select the return that you want to delete. The RTV Details window opens.
2. Click **Delete**. A message is displayed: “Are you sure you want to delete the RTV?”
3. Click **Yes**. The status of the RTV is updated to Canceled RTV. The return is displayed in the RTV List in cancelled RTV status.

RTV Shipment

RTV Shipment List Window

Navigate: Main Menu > Shipping/Receiving > RTV Shipment. The RTV Shipment List window opens.

Figure 11–6 RTV Shipment List Window

ID	Authorization	Supplier	Not After Date	Status	Total Container SKUs
443	43	281731884 RMS_ITEM_SupplierS...	6/24/2015	In Progress	1
461		115868815 RMS_ITEM_SupplierS...	6/25/2015	In Progress	0
463	111	281731884 RMS_ITEM_SupplierS...	6/25/2015	Submitted	1
481	9433	281731884 RMS_ITEM_SupplierS...	6/25/2015	In Progress	4
561		115868815 RMS_ITEM_SupplierS...	6/25/2015	In Progress	0
563		115868815 RMS_ITEM_SupplierS...	6/26/2015	In Progress	2
581		281731884 RMS_ITEM_SupplierS...	6/27/2015	In Progress	1
722	12346	281731884 RMS_ITEM_SupplierS...	7/1/2015	In Progress	0
725	222	115868815 RMS_ITEM_SupplierS...	7/1/2015	In Progress	1
726	222	115868815 RMS_ITEM_SupplierS...	7/1/2015	In Progress	0
728	11	115868815 RMS_ITEM_SupplierS...	7/1/2015	In Progress	0
741	234	115868815 RMS_ITEM_SupplierS...	7/29/2015	In Progress	2
801	12345	281731884 RMS_ITEM_SupplierS...	7/30/2015	Submitted	2
846	2	115868815 RMS_ITEM_SupplierS...	6/30/2015	In Progress	0
847	5456	115868815 RMS_ITEM_SupplierS...	6/28/2015	In Progress	0
848	5456	115868815 RMS_ITEM_SupplierS...	6/27/2015	In Progress	0
921	22	115868815 RMS_ITEM_SupplierS...	8/1/2015	In Progress	2
923	33	115868815 RMS_ITEM_SupplierS...	8/1/2015	In Progress	0
924		115868815 RMS_ITEM_SupplierS...	8/1/2015	In Progress	0
925		115868815 RMS_ITEM_SupplierS...	8/1/2015	In Progress	0
926		115868815 RMS_ITEM_SupplierS...	8/1/2015	In Progress	1
927		115868815 RMS_ITEM_SupplierS...	8/1/2015	New	0
941	12222	281731884 RMS_ITEM_SupplierS...	8/2/2015	In Progress	0
942	12222	281731884 RMS_ITEM_SupplierS...	8/2/2015	In Progress	1
943		115868815 RMS_ITEM_SupplierS...	8/2/2015	In Progress	0
944	12222	281731884 RMS_ITEM_SupplierS...	8/2/2015	In Progress	1
945	12222	281731884 RMS_ITEM_SupplierS...	8/2/2015	In Progress	0

The RTV Shipment List window displays the following information about returns:

Column	Description
ID	SIM identifier for the return
Authorization	Authorization number, if required for returns
Supplier	ID and name of the Supplier
Not After Date	Date after which a return request cannot be dispatched (supplied by an external system)
Status	Current status of the return shipment: <ul style="list-style-type: none"> ■ New – A shipment header has been created. ■ In Progress – The request has been saved. ■ Submitted – All containers and items are defined for the shipment. The shipment is ready for shipping. ■ Shipped – The return has been shipped through the carrier. ■ Cancelled – The shipment has been cancelled.
Total Container SKUs	Total number of SKUs added in individual containers

From the RTV Shipment List window, you can do the following:

- [Filter the RTV Shipment List](#)
- [Create an RTV Shipment](#)
- [Edit or View an RTV Shipment](#)
- [Dispatch a Return](#)
- [Print a Bill of Lading](#)

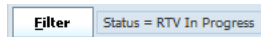
- [Delete an RTV Shipment](#)

From the RTV Shipment List window, click **Back** to return to the Shipping/Receiving menu.

Filter the RTV Shipment List

At any time while the RTV Shipment List window is open, you can click **Filter** to change how the list is filtered.

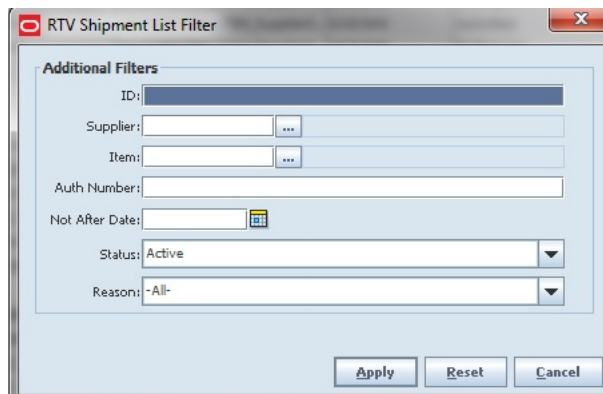
Current filtering is displayed next to the Filter button. If no filtering is displayed, all items are currently selected and listed.



To change how the list is filtered:

1. Click **Filter**. The RTV Shipment List Filter window opens.

Figure 11–7 RTV Shipment Filter Window



2. If you want to reset all filtering criteria to the default values, click **Reset**.
3. Enter or select filtering criteria as needed to select just the RTV shipments you want to list. All criteria are optional. If you leave a field blank or select All, all values will be included in your filtering selection.

ID – Enter the complete number generated by SIM for the shipment.

Supplier – Use this field to select returns to a supplier. Enter or look up the Supplier ID.

In the Supplier Lookup window, locate and select the supplier you want. Click **Apply** to return to the List Filter window. See [“Supplier Lookup”](#) in [Chapter 20](#) for more information.

Item – Enter or look up the Item ID.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Item Request Filter window. See [“Item Lookup”](#) in [Chapter 20](#) for more information.

Auth Number – Enter the complete authorization number of the return.

Not After Date – Enter the date before which the shipment needs to shipped.

Status – Select a status from the drop-down list. The default is Active.

Reason – Select a reason from the drop-down list.

4. Click **Apply**. The results that match your search criteria are displayed in the RTV Shipment List window.

Create an RTV Shipment

Create an RTV Shipment to return items to a supplier. Unavailable or available stock may need to have a return created.

Navigate: Main Menu > Shipping/Receiving > RTV Shipment. The RTV Shipment List window opens.

To create a shipment, follow these steps:

1. Click **Create**. The RTV Shipment Create window opens.

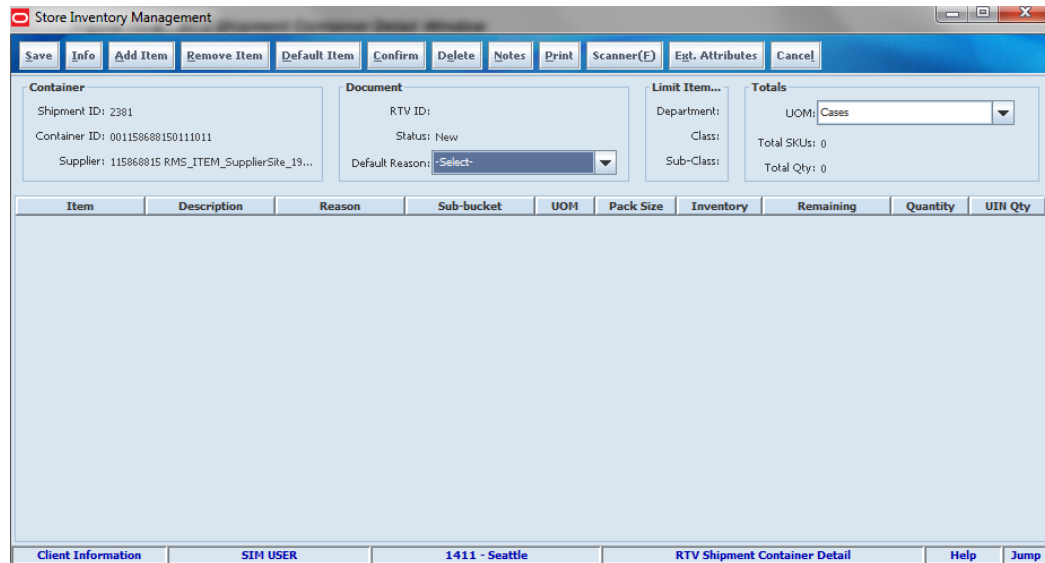
Figure 11–8 RTV Shipment Create Window

2. Enter the details on the return:
 - a. In the **Supplier** field, enter a supplier or click the **Ellipsis** button to look up a supplier. See “[Supplier Lookup](#)” in [Chapter 20](#) for more information.
 - b. In the **Not After Date** field, enter the date or use the Calendar button to select a date. When the selected date is reached, the RTV can no longer be shipped.
 - c. In the **Auth Number** field, enter the authorization number to help you track the return.
 - d. In the **Return Type** field, select the return type from the drop-down list.
3. Click **Apply**. The RTV Shipment Detail window opens.

Figure 11–9 RTV Shipment Detail Window

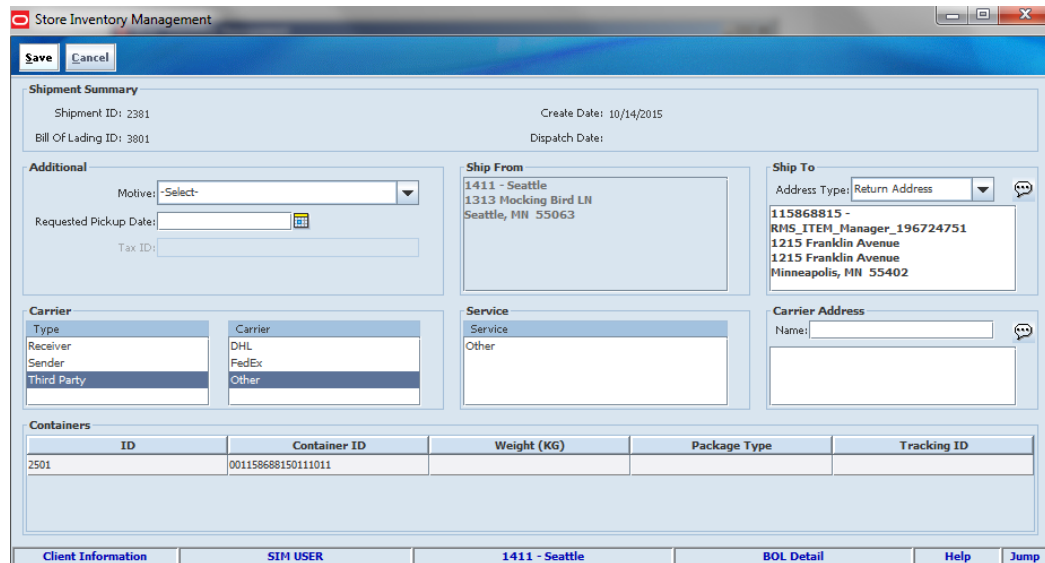
4. To create a container, click Create Container. The RTV Shipment Container Detail window opens.

Figure 11–10 RTV Shipment Container Detail Window



5. Update bill of lading (BOL) information:
 - a. Click **BOL**. The BOL Detail window opens.

Figure 11–11 BOL Detail Window



- b. Update the following fields as needed:
 - Address Type** – The primary mailing address is selected by default. If there are multiple addresses, select the address type to which you want to ship the return. (You can also enter a different new address in the Alternate Destination Address field.)
 - Motive** – Select a value from the drop-down list.

Tax ID – If this field is blank, enter the tax ID for the supplier.

Carrier – Select the type of Carrier. Select other pertaining information if necessary, including Service.

Weight – Weight of package if required per the service.

Package Type – Select the type of package for the shipment.

Requested Pickup Date – Enter or select the date when you want the return picked up.

Tracking ID – Enter a tracking ID number.

- c. Click **Save**.

Note: Depending on the deployment of SIM and backend applications, it is possible for the tracking ID field will be filled in automatically by a Manifest system when submitting or dispatching. Check the *Oracle Retail Store Inventory Management Implementation Guide Volume 2 - Integration with Oracle Retail Applications* for more information.

6. To update the Extended Attributes, select a row and click **Ext. Attributes**. The Extended Attributes window opens. This window captures additional information about an item.

Figure 11–12 Extended Attributes Entry Window

Batch/Lot	Best Before	Origin	Sell By	Use By	Scan Qty
11110					2
458					2

Extended Attributes

Batch/Lot:

Best Before:

Origin:

Sell By:

Use By:

Apply Add Attributes Remove Attributes Cancel

Note: The Extended Attributes Entry window view may vary, depending upon customer chosen attributes.

- Enter/select the field options.
 - Click **Add Attributes** to add the additional attributes to the item.
 - Click **Apply** to save the changes and return to the previous window.
7. Click **Info**. The Container Info window opens.

Figure 11–13 Container Info Window

The screenshot shows a window titled "Container Info" with the following fields and values:

- ID: 2501
- Status: In Progress
- Create Date: 10/14/2015
- Create User: SIM_USER
- Approved Date:
- Approved User:
- Canceled Date:
- Canceled User:
- Last Update: 10/14/2015
- Last Update User: SIM_USER

Below these fields are input fields for:

- Container ID: 001158688150111011
- Package Type: -Select-
- Weight (KG):
- Tracking ID:
- Container Label: -Select-

At the bottom are three buttons: Apply, Print Label, and Cancel.

- a. Complete the fields that are enabled:

Package Type – This field is the type of box (small box, large box, and so on). The value can be selected by the user from the drop-down list. If manifesting is being used and when called, the carrier/service may require the package type identified. If manifesting is being used and the package type is not selected when the carrier/service requires, the user is prompted with a message.

Weight (LBS) – Displays the weight of the package. This field is used by the user to enter in the weight for the package (shipment). It defaults to blank.

The weight is editable. It is not dependent on the Carrier Type or Carrier. If Manifesting is being used (store admin), and if the carrier/service is configured to require weight (as defined in the database), the Weight is required. If Manifesting is being used and the weight is not entered, the user is prompted with a message.

The weight must be greater than zero. Decimals are allowed. The weight UOM is incorporated into the Weight field label in parentheses, for example, (Lbs).

Tracking ID – This field is an ID used for tracking the delivery route of a package when it ships. Only a single tracking ID can be entered. When manifesting is being used, the tracking ID is filled in when the information is returned.

- b. Click **Apply**. You return to the RTV Shipment Detail window.
8. To enter any additional information, click **Notes**. The RTV Shipment Notes window opens. For each note, enter your information and click **Save**. When you have finishing entering notes, click **Apply**.
9. Save or dispatch the RTV Shipment:
 - a. Click **Save** to save the information that you entered so you can update or approve the RTV Shipment at a later time. You return to the RTV Shipment List window.

- b. Click **Dispatch** to dispatch the RTV Shipment. You return to the RTV Shipment List window.

Edit or View an RTV Shipment

You can view any return record, and you can update in-progress RTVs when necessary.

Navigate: Main Menu > Shipping/Receiving > RTV Shipment. The RTV Shipment List window opens.

To edit or view a return, follow these steps:

1. If you want to limit which RTV shipments are listed, filter the list. See "[Filter the RTV Shipment List](#)."
2. Select the RTV shipment that you want to edit or view. The RTV Detail window opens.
3. Update enabled fields as needed:

Sub-bucket – The sub-bucket will display what is associated with the reason code.

Note: These are only displayed for reason codes with an inventory status to take inventory from unavailable stock. This will display only if the system is configured for sub-buckets.

Unit of Measure – From the drop-down list, select the UOM.

Default Reason – Select the default reason why you are returning the items from the Default Reason drop-down.

Reason – Select the reason that you are returning a specific item from the Reason drop-down.

UIN Qty – Update UINs for the return as needed. See "[Update UINs for a Return](#)."

4. Add or remove items as needed. See "[Create an RTV Shipment](#)" for more information about adding and deleting return items.
5. If needed, update bill of lading (BOL) information. See "[Create an RTV Shipment](#)" for more information about updating BOL information.
6. To submit the return, click **Submit**. You receive a prompt to verify that you want to submit the return now. Click **Yes**.
7. To dispatch the return immediately, click **Dispatch**. You receive a prompt to verify that you want to dispatch the return now. Click **Yes**. For more information about dispatching a return, see "[Dispatch a Return](#)."

Note: Submit will be available if system is configured as such. If it is configured to submit, you will only have a submit or a dispatch. You cannot have both at the same time. It will require that you submit in order to dispatch. Once you submit, then you will be able to dispatch.

If you do not want to dispatch the shipment, click **Save**. The return is saved until it is dispatched. You return to the RTV Shipment List window.

Dispatch a Return

Dispatch a return to complete the return.

Navigate: Main Menu > Shipping/Receiving > RTV Shipment. The RTV Shipment List window opens.

To dispatch a return:

1. Select the shipment from the list. The RTV Shipment Detail window opens.
2. Click **Dispatch**. A message is displayed: "Are you sure you want to dispatch the selected returns now?"
3. Click **Yes**. The return shipment is dispatched.

Print a Bill of Lading

For any return, you can print a bill of lading (transport document) that accompanies the merchandise when it is shipped. You can print the bill of lading at any time; however, if the return is not yet dispatched or if it is cancelled, the bill of lading is marked DRAFT or CANCELLED.

Note: Bill of lading information must be entered or updated when returns are created or updated.

Navigate: Main Menu > Shipping/Receiving > RTV Shipment. The RTV Shipment List window opens.

To print a bill of lading:

1. Select the return shipment for which you want to print a bill of lading.
2. Click **Print**.
3. Select the **RTV Shipment BOL** format and the printer.
4. Click **Apply**.

Delete an RTV Shipment

Delete a return record if you are cancelling the shipment. If a shipment is deleted, the RTV associated with it also gets deleted.

Note: You can delete a return only if it has not been dispatched.

Navigate: Main Menu > Shipping/Receiving > RTV Shipment. The RTV Shipment List window opens.

To delete a return:

1. Select the return that you want to delete. The RTV Shipment Details window opens.
2. Click **Delete**. A message is displayed: "Deleting a shipment will also delete all containers. Are you sure you want to delete the shipment?"
3. Click **Yes**. The status of the shipment is updated to Canceled. The return is displayed in the RTV Shipment List in cancelled status.

Inventory Adjustments

Inventory adjustments that you enter in SIM are supplied to the merchandising system to adjust stock levels and maintain perpetual inventory. Inventory adjustments increment or decrement inventory levels such as stock on hand and unavailable inventory.

Each inventory adjustment contains a reason code that determines the disposition of the inventory being adjusted. For example, inventory removed for repair adds to unavailable inventory and decreases the stock on hand.

Inventory Adjustment List Window

Navigate: Main Menu > Inventory Mgmt > Inventory Adjustment. The Inventory Adjustment List window opens.

Figure 12–1 *Inventory Adjustment List Window*

Adjustment ID	Template	Date	Status	Total SKUs	Create User
301	121	4/4/12	In Progress	2	Sue
401		4/20/12	In Progress	4	Sue
481	241	4/24/12	In Progress	1	Sue
482		4/24/12	In Progress	5	Sue
521	241	5/1/12	In Progress	1	Sue
541		5/3/12	In Progress	2	Sue
581	261	5/4/12	In Progress	2	Sue
841		6/1/12	In Progress	1	Sue
842		6/1/12	In Progress	3	Sue
984		7/3/12	In Progress	1	Sue
1002		7/5/12	In Progress	1	Sue

From the Inventory Adjustment List window, you can do the following:

- [Filter the Inventory Adjustment List](#)
- [Create an Inventory Adjustment](#)
- [Create an Inventory Adjustment Template](#)
- [Edit an In-Progress Inventory Adjustment](#)
- [Enter UINs for an Inventory Adjustment](#)

- [Print an Inventory Adjustment Report](#)

Filter the Inventory Adjustment List

At any time while the Inventory Adjustment List window is open, you can click **Filter** to change how the list is filtered.

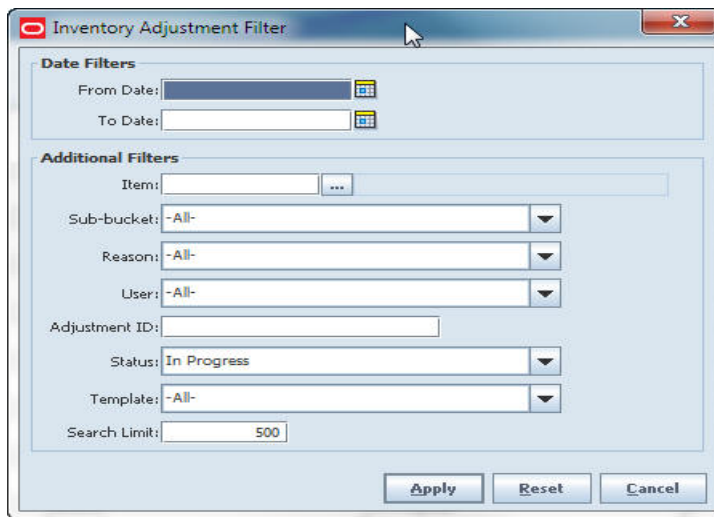
Current filtering is displayed next to the Filter button on the Inventory Adjustment List window. If no filtering is displayed, all items are currently selected and listed.



To change how the list is filtered, follow these steps:

1. Click **Filter**. The Inventory Adjustment Filter window opens.

Figure 12–2 Inventory Adjustment Filter Window



2. If you want to reset all filtering criteria to default values, click **Reset**.
3. Enter or select filtering criteria as needed to select just the inventory adjustments you want to list. All criteria are optional. If you leave a field blank or select All, all values will be included in your filtering selection.

Date Filters – Enter or select dates to select only those inventory adjustments between a From Date and To Date that you specify.

Item – Enter the item number or click the **Ellipsis** button to look up the Item ID.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Item Request Filter window. See “[Item Lookup](#)” in [Chapter 20](#) for more information.

Sub-bucket – Select a sub-bucket from the drop-down list.

Note: Will only be displayed if the system is configured for sub-buckets.

Reason – Select a reason from the drop-down list.

User – Select a user from the drop-down list.

Adjustment Number – Enter the complete number generated by SIM for the adjustment.

Status – Select a status from the drop-down list. The default is In Progress.

Template – Select a template from the Template List.

Search Limit – If you want to change the maximum number of inventory adjustments returned from the search, enter an integer value. You can enter an integer value from 1 to 999; the default value is 500.

4. Click **Apply**. Results that match your search criteria are displayed in the Inventory Adjustment List window.

Create an Inventory Adjustment Template

Creating a template allows you to set up a group of items, reasons, and quantities to be adjusted that will re-occur. A multiplier may also be used, to take the quantities from the template and multiply them by a user-defined value. The user can then modify what is applied, delete, and add additional items to be adjusted.

At any time while the Template List window is open, you can click **Filter** to change how the list is filtered.

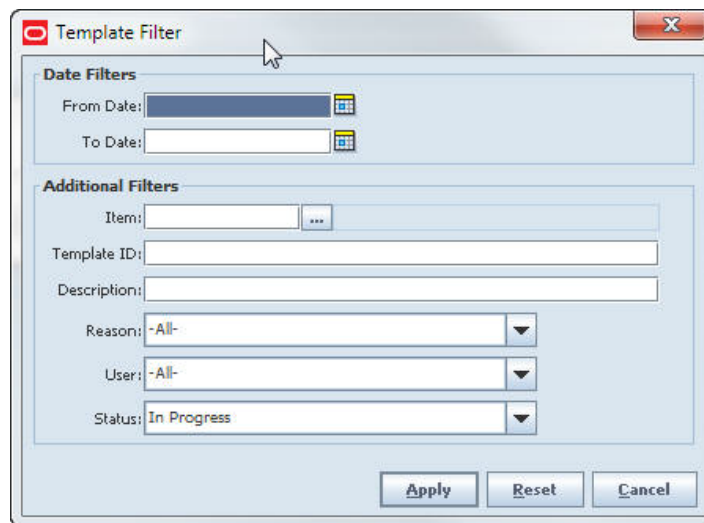
Current filtering is displayed next to the Filter button on the Template List window. If no filtering is displayed, all items are currently selected and listed.



To change how the list is filtered, follow these steps:

1. Click **Filter**. The Template Filter window opens.

Figure 12–3 Template Filter Window



2. If you want to reset all filtering criteria to default values, click **Reset**.
3. Enter or select filtering criteria as needed to select just the template items you want to list. All criteria are optional. If you leave a field blank or select All, all values will be included in your filtering selection.

Date Filters – Enter or select dates to select only those templates between a From Date and To Date that you specify.

Item – Enter the item number or click the [Ellipsis](#) button to look up the Item ID.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the previous window. See “[Item Lookup](#)” for more information.

Template ID – Enter the ID of the template.

Description – Enter the description of the template.

Reason – Select a reason from the drop-down list.

User – Select a user from the drop-down list.

Status – Select a status from the drop-down list. The default is In Progress.

4. Click **Apply**. Results that match your search criteria are displayed in the Inventory Adjustment List window.

Create a Template

Creating a template allows you to set up a group of items, reasons, and quantities to be adjusted that will re-occur. To create a template using an existing template, follow these steps:

1. Click **Template**. The Template List window opens.

Figure 12-4 *Template List Window*

Template ID	Description	Date	Status	Total SKUs	Create User
61	Sue Delete no security Reason Code.	3/6/12	In Progress	2	Sue
141	Item Template	4/11/12	In Progress	5	Sue
161	skksaks	4/12/12	In Progress	2	Sue
281	Long Item Description	5/6/12	In Progress	1	Sue
282	Short	5/6/12	In Progress	1	Sue
441	WEB	5/21/13	In Progress	2	Sue

2. Click **Create**. The Template Detail window opens.

Figure 12–5 Template Detail Window

3. Enter or select the criteria as needed to select just the template items you want to create.
 - **Description** – Enter the description of the template.
 - **Comments** – Enter the item number or click the [Ellipsis](#) button to look up the Item ID.
 In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Item Request Filter window. See “[Item Lookup](#)” for more information.
 - **Reason** – In the Reason field, you can optionally select a default reason for the inventory adjustments that you enter.
 If you select a default reason, it is automatically included in the Reason field for each adjustment you create. You can change the Reason field for any adjustment.
 - Click **Add Item** to include specific items to the template. Enter the item number or click the [Ellipsis](#) button to look up the Item ID.
 In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the previous window. See “[Item Lookup](#)” for more information.
 - Select a **Reason**, if not defaulted from the header.
 - Enter a **UOM**.
 - Enter the **Pack Size**.
 - Enter the **Quantity**.
4. Click **Save** to save your changes, but not put the template into action yet. You can return to the template later, and make further changes to committing the template for use.
5. Click **Confirm** to save and start using the template.

Edit a Template

To edit a template from the usable templates list, follow the following steps:

1. In the Inventory Adjustment List window, click **Template**. The Template List window opens.

2. Double-click on a specific template. The Template Detail window opens, allowing you to edit the specifics, including adding and removing an item.
3. Click **Save** to save your changes, but not put the template into action yet. You can return to the template later, and make further changes prior to committing the template for use.
4. Click **Confirm** to save the changes and start using the template.

Delete a Template

To delete a template from the usable templates list, follow the following steps:

1. In the Inventory Adjustment List window, click **Template**. The Template List window opens.
2. Select the template that you want to delete from the list of templates.
3. Click **Delete**. A message is displayed: “Are you sure you want to delete the selected templates?”
4. Click **Yes**.
5. Click **Back** to return to the Inventory Adjustment List window.

Create an Inventory Adjustment

To create a new inventory adjustment, follow these steps:

Navigate: Main Menu > Inventory Mgmt > Inventory Adjustment. The Inventory Adjustment List window opens.

1. Click **Create**. The Inventory Adjustment Detail window opens with a blank line displayed.

Figure 12–6 Inventory Adjustment Detail Window – Create

2. Click **Add Item** to include specific items to the template. Enter the item number or click the [Ellipsis](#) button to look up the Item ID.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the previous window. See “[Item Lookup](#)” for more information. Or click **Scanner** to scan the item. See “[Scan an Item \(Scanner Button\)](#)” in [Chapter 2](#) for more information.

3. In the **Template** area, select a template from the drop-down list. This is an optional step to quickly enter repetitive steps.
4. You can copy an existing inventory adjustment transaction, taking all of the items, quantities, and reasons from the inventory adjustment and copy them to the new transaction. To copy, open a completed inventory adjustment and click **Copy** to create an In Progress replica.
5. Enter the **Multiplier** to be applied to the template. For example, 3 would take every quantity on the transaction and multiply it by 3, if using a template.
6. Click **Apply Template**. The fields populate accordingly, if using a template.
7. In the **Comments** field, enter any notes that are needed to describe or explain this inventory adjustments.
8. If you select a default reason, it is automatically included in the **Reason** field for each adjustment you create. You can change the Reason field for any adjustment.
9. From the **Sub-bucket** field, select a sub-bucket from the drop-down list.

Note: Sub-buckets are only displayed for reason codes with an inventory status to take inventory from unavailable stock. Sub-buckets will display only if the system is configured for sub-buckets.

10. Enter the item number in the **Item** field, or click the **Ellipsis** button to look up the item.

In the Item Lookup window, enter search criteria as needed to find the item you want. (See “[Item Lookup](#)” in [Chapter 20](#) for more information about item lookup criteria.) Select the item you want and click **Apply** to return to the Inventory Adjustment Detail window. Or click **Scanner** to scan the item. See “[Scan an Item \(Scanner Button\)](#)” in [Chapter 2](#) for more information.

11. Select a **Reason**, if not defaulted from the header.
12. Update these fields as needed:
 - UOM** – From the drop-down list, select the unit of measure.
 - Quantity** – Enter the quantity to be adjusted.

Note: For items that require serial number type UINs, the Quantity field is disabled. See “[Enter UINs for an Inventory Adjustment](#).”

13. To add another item, click **Add Item**. A new blank line is displayed. Repeat Steps 2 and 3 to add the item.

Note: If you enter multiple items, SIM creates an inventory adjustment record for each item.

14. Click **Save** to save your changes. You can return to the adjustment later, and make further changes prior to committing the adjustment.
15. Click **Confirm** to complete the adjustment. Stock on hand will be updated.
16. Click **Save** to return to the Inventory Adjustment List window.

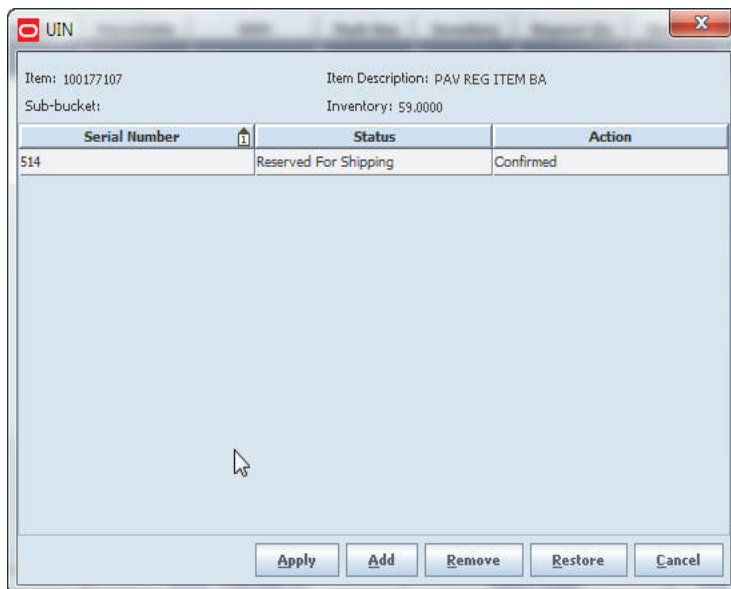
Enter UINs for an Inventory Adjustment

If an item requires a serial number type UIN, the Quantity field is disabled on the Inventory Adjustment Detail window.

Follow these steps to add individual item UINs to the inventory adjustment:

1. Double-click the **UIN Qty** field. The UIN window opens.

Figure 12–7 UIN Window – Inventory Adjustment



2. For each UIN you want to add, follow these steps:
 - a. Click **Add**.
 - b. In the unique identification number field, enter the valid UIN of the item.
To delete a UIN you have entered, select the UIN and click **Remove**.
3. (Optional) If you want to select a reason for the adjustment of this line item, select the reason from the drop-down list at the top of the window.
4. Click **Apply** to return to the Inventory Adjustment Detail window.

Edit an In-Progress Inventory Adjustment

You can edit an inventory adjustment only if its status is In Progress. You can modify items, add new items, or delete items from a pending adjustment.

Navigate: Main Menu > Inventory Mgmt > Inventory Adjustment. The Inventory Adjustment List window opens.

1. If you want to limit which inventory adjustments are listed, filter the list. See [“Filter the Inventory Adjustment List.”](#)
2. Find the inventory adjustment that you want to edit. Double-click the inventory adjustment to open it in the Inventory Adjustment Detail window.

Figure 12–8 Inventory Adjustment Detail Window – Edit

Item	Item Description	Reason	Disposition	Sub-bucket	UOM	Pack Size	Inventory	Quantity	UIN Qty
100151995	elt do not use:Red:G	Stock Count In	+ Stock On Hand		Units	1		100	
100136070	Item1:Brown:Blueberr	Stock Count In	+ Stock On Hand		Units	1		100	
100136100	Item1:Brown:Cherry:5	Damaged - Out	- Stock On Hand		Units	1	177	1	
100136010	Item1:Black:Raspberr	Wastage	- Stock On Hand		Units	1	4978	1	

3. Update these fields as needed:

Comments – Enter or change any notes required to describe or explain this inventory adjustment. The comment will be added to the inventory adjustment record of the item affected by the disposition change.

Reason – Select the reason code from the drop-down list.

Disposition – From the drop-down list, select a disposition.

UOM – From the drop-down list, select the unit of measure.

Quantity – Enter the quantity to be adjusted. The quantity you enter must be less than or equal to the quantity listed.

Note: For items that require UINs, you cannot change the quantity or add any UINs to the adjustment.

4. If you want to print an inventory adjustment report, click **Print**. See “[Print an Inventory Adjustment Report](#).”
5. Click **Save** to save your changes. You can return to the adjustment later, make further changes prior to committing the adjustment.
6. Click **Confirm** to complete the adjustment and update stock on hand.
7. Click **Save** to return to the Inventory Adjustment List window.

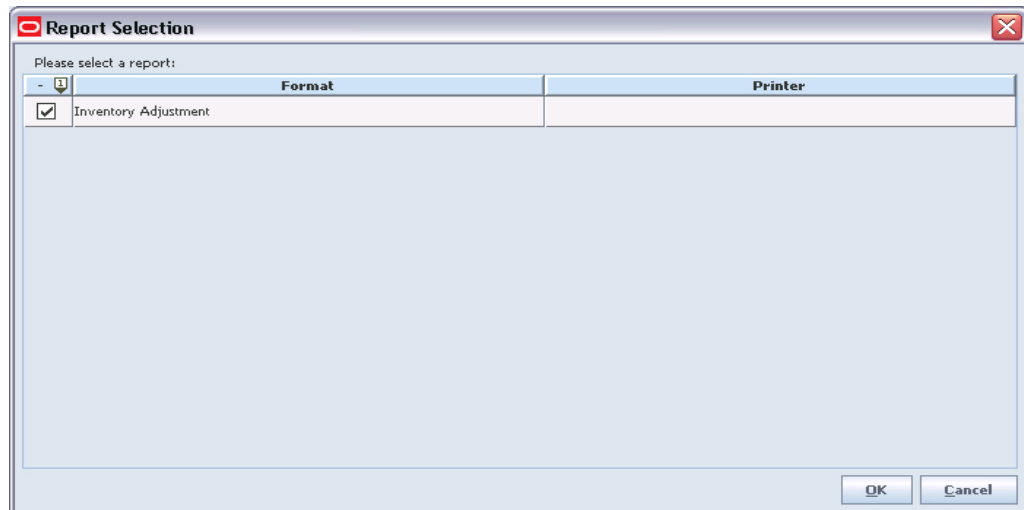
Print an Inventory Adjustment Report

You can print an inventory adjustment report from either the Inventory Adjustment List or Inventory Adjustment Detail window:

- If you are printing the report from the Inventory Adjustment List window, first select the adjustments for which you want to print reports.
- If you are printing the report from the Inventory Adjustment Detail window, the report printed is for the adjustment currently displayed.

To print the report, follow these steps:

1. Click **Print**. The Report Selection window opens.



2. In the **Printer** field, double-click and select the printer or other output device for the report.
(See “[Print or View SIM Reports and Other Output](#)” in [Chapter 2](#) for general information about SIM report output.)
3. Click **OK**. You receive a message that the report was printed.
4. Click **OK**.

Sequencing

Sequencing a store establishes an ordered list of locations in a store at which items can be stocked, and ordered lists of the items within each location. The list of locations is the *macro sequence*. Each list of items within a location is a *micro sequence*. These sequences allow you to identify all the locations of any item in the store.

Within each location, you can add and remove items or resequence the items at that location. You can add and remove items and locations as needed. You can build sequences by assigning items to locations, or by assigning locations to items.

Sequencing can improve the efficiency of store processes such as stock counts. You can use guided stock counts in which employees are guided in order through the locations and items, one after another.

Macro Sequence List Window

Navigate: Main Menu > Inventory Mgmt > Sequencing. The Macro Sequence List window opens.

Figure 13–1 Macro Sequence List Window

Location	Area	Total Items
No Location	No Location	295
Seq 1	Shopfloor	4
Seq 2	Shopfloor	7
Seq 3	Backroom	5
Seq4	Backroom	3
Seq 5	Shopfloor	6
Seq 6	Shopfloor	4
Seq All	Shopfloor	3
Seq 7	Backroom	4
Seq 8	Backroom	4
Seq 9	Shopfloor	1
Seq 10	Shopfloor	7
Alcohol and Liqueurs - Alch/Fruit Alchl	Shopfloor	2
Art Supplies - Calligraphy	Shopfloor	1
Art Supplies - Painting	Shopfloor	1
Sue Pick 30	Shopfloor	1

The screenshot also shows a 'Find Item:' search box, navigation buttons (Back, Edit Locations, Search, Print), and a status bar at the bottom with client information and window controls.

From the Macro Sequence List window, you can do the following:

- [Add a Location](#)
- [Edit a Location](#)
- [Delete Locations](#)
- [Look Up Location Details for an Item](#)
- [Add a Location for an Item](#)
- [Edit Location Information for an Item](#)
- [Delete Locations for an Item](#)
- [Assign Unassigned Items to a Location](#)
- [Add an Item to a Location](#)
- [Edit Items at a Location](#)
- [Delete Items from a Location](#)
- [Print Shelf Edge Labels](#)

From the Macro Sequence List window, click **Back** to return to the Inventory Management menu.

Add a Location

Use this procedure to add a new location in the store to the macro sequence of locations.

Navigate: Main Menu > Inventory Mgmt > Sequencing. The Macro Sequence List window opens.

To add a new location, follow these steps:

1. Click **Edit Locations**. The Macro Sequence Edit window opens.

Figure 13–2 Macro Sequence Edit Window

Location	Area	Total Items
Seq 1	Shopfloor	4
Seq 2	Shopfloor	7
Seq 3	Backroom	5
Seq4	Backroom	3
Seq 5	Shopfloor	6
Seq 6	Shopfloor	4
Seq All	Shopfloor	3
Seq 7	Backroom	4
Seq 8	Backroom	4
Seq 9	Shopfloor	1
Seq 10	Shopfloor	7
Alcohol and Liqueurs - Alch/Fruit AlchI	Shopfloor	2
Art Supplies - Calligraphy	Shopfloor	1
Art Supplies - Painting	Shopfloor	1
Sue Pick 30	Shopfloor	1
Sue Bug	Shopfloor	1
Sue Pick A	Shopfloor	2

2. Click **Add Location**. A new blank line is displayed at the bottom of the list.
3. Update the fields of the new line:
 - Location** – Enter the name of the location that you want to add.
 - Area** – Select Backroom or Shopfloor from the drop-down list.
4. Click **Save** to return to the Macro Sequence List window.

Edit a Location

Use this procedure to change information about a location in the macro sequence.

Navigate: Main Menu > Inventory Mgmt > Sequencing. The Macro Sequence List window opens.

To edit information about a location, follow these steps:

1. Click **Edit Locations**. The Macro Sequence Edit window opens.
2. Select the location that you want to edit.
3. Perform one or more of the following actions.

Change the Area

In the **Area** field, select the value from the drop-down list.

Generate Locations for All Classes

If you generate locations for all classes, a new location is created for each item class, in alphabetical order, starting at the end of the existing location sequence. Every class will be a location. If a location already exists for a class, it will not be added.

- a. Click **Apply Class List**. This message is displayed: “Are you sure you want to generate locations for all classes?”
- b. Click **Yes**. This message is displayed: “Would you like to apply classes to the shopfloor or backroom?”
- c. Click either **Shopfloor** or **Backroom** as the area to which you want to apply classes.

Change the Macro Sequence Order of a Location

- a. Select the classes that you want to move.
 - b. Click **Move Up** or **Move Down**.
4. Click **Save**. Your changes are displayed in the Macro Sequence List window.

Delete Locations

Use this procedure to delete locations from the macro sequence.

Navigate: Main Menu > Inventory Mgmt > Sequencing. The Macro Sequence List window opens.

To delete locations, follow these steps:

1. Click **Edit Locations**. The Macro Sequence Edit window opens.
2. Select the locations you want to delete.
3. Click **Remove Location**. A message is displayed: “Are you sure you want to delete the selected locations now?”
4. Click **Yes**.
5. Click **Save** to return to the Macro Sequence List window.

Look Up Location Details for an Item

Use this procedure to look up location details for an item. You can find the locations of items that have been sequenced, and you can also determine if an item has no location assigned yet.

Navigate: Main Menu > Inventory Mgmt > Sequencing. The Macro Sequence List window opens.

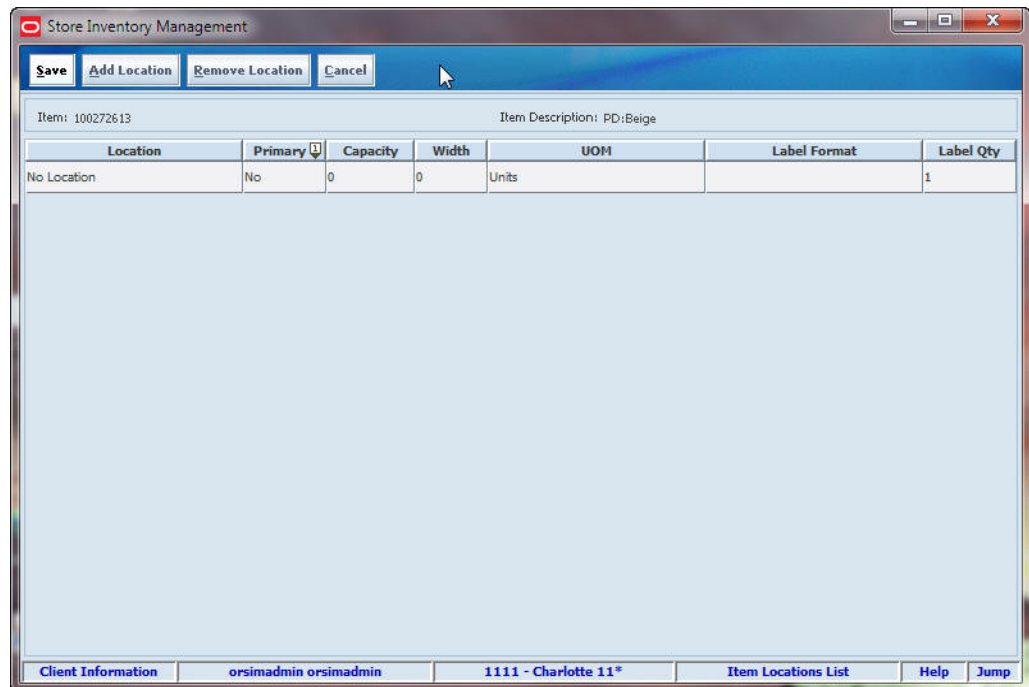
To look up location details for an item, follow these steps:

1. In the Find Item field, enter the item number for which you want to view location information, or click the **Ellipsis** button to look up an item.

In the Item Lookup window, locate the item you want and select it. Click **Apply** to return to the Macro Sequence List window. See “[Item Lookup](#)” in [Chapter 20](#) for more information.

2. Click **Search**. The Item Locations List window opens with location information displayed for the item.

Figure 13–3 Item Locations List Window



In the Item Locations window, you can do the following:

- [Add a Location for an Item](#)
 - [Edit Location Information for an Item](#)
 - [Delete Locations for an Item](#)
3. Click **Save** to return to the Macro Sequence List window.

Add a Location for an Item

Use this procedure to add a new location for an item stocked at a particular location.

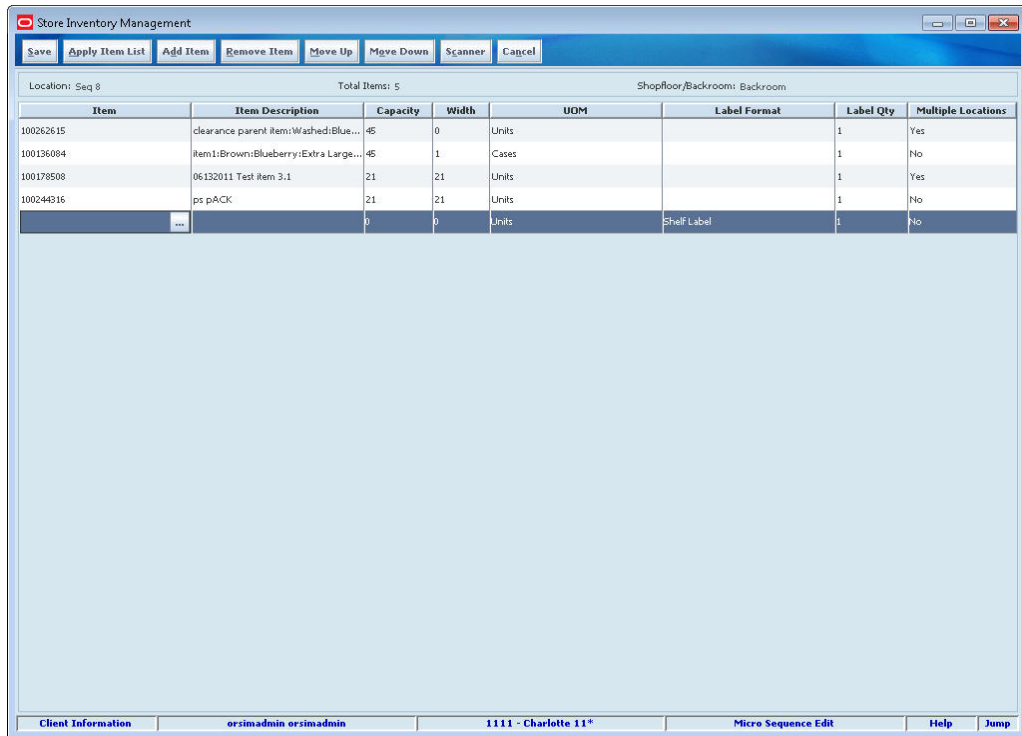
Note: You can also add a location for an item by first looking up an item, instead of selecting a location. See "[Look Up Location Details for an Item.](#)"

Navigate: Main Menu > Inventory Mgmt > Sequencing. The Macro Sequence List window opens.

To add a new location for an item, follow these steps:

1. Double-click the location for which you want to view micro sequencing. The Micro Sequence List window opens.

Figure 13–4 Micro Sequence List Window



2. Double-click the item for which you want to add another location. The Item Locations List window opens.
3. For each location you want to add, follow these steps:
 - a. Click **Add Location**. A new blank line is displayed at the bottom of the list.
 - b. Update the fields:
 - Location** – Select a location from the drop-down list.
 - Primary** – Select Yes if this is a primary location or No if this is a secondary location. You can have only one primary location for each item.
 - Capacity** – Enter the quantity of the item that can fit on the shelf at this location.
 - Width** – Enter the number of items that can fit horizontally across the shelf at this location.
 - UOM** – Select Cases or Units from the drop-down list.
 - Label Format** – Select the format of the shelf label from the drop-down list.
 - Label Qty** – Enter the number of labels to print.
4. Click **Save** to return to the Micro Sequence List window.
5. Click **Back** to return to the Macro Sequence List window.

Edit Location Information for an Item

Use this procedure to update location information about an item in a particular location.

Note: You can also edit location information for an item by first looking up an item, instead of selecting a location. See [“Look Up Location Details for an Item.”](#)

Navigate: Main Menu > Inventory Mgmt > Sequencing. The Macro Sequence List window opens.

To edit location information for an item, follow these steps:

1. Double-click the location for which you want to view micro sequencing. The Micro Sequence List window opens.
2. Double-click the item for which you want to edit location information. The Item Locations List window opens.
3. For each location you want to edit, update the fields as needed:
 - Primary** – Select Yes if this is a primary location or No if this is a secondary location. You can have only one primary location for each item.
 - Capacity** – Enter the quantity of the item that can fit on the shelf at this location.
 - Width** – Enter the number of items that can fit horizontally across the shelf at this location.
 - UOM** – Select Cases or Units from the drop-down list.
 - Label Format** – Select the format of the shelf label from the drop-down list.
 - Label Qty** – Enter the number of labels to print.
4. Click **Save** to return to the Micro Sequence List window.
5. Click **Back** to return to the Macro Sequence List window.

Delete Locations for an Item

Use this procedure to delete one or more locations for an item at a particular location.

Note: You can also delete location information for an item by first looking up an item, instead of selecting a location. See [“Look Up Location Details for an Item.”](#)

Navigate: Main Menu > Inventory Mgmt > Sequencing. The Macro Sequence List window opens.

To delete locations for an item, follow these steps:

1. Double-click the location for which you want to view micro sequencing. The Micro Sequence List window opens.
2. Double-click the item for which you want to delete locations. The Item Locations List window opens.
3. Select the locations you want to delete.
4. Click **Remove Location**. This message is displayed: “Are you sure you want to delete the selected locations now?”
5. Click **Yes**.
6. Click **Save** to return to the Micro Sequence List window.

- Click **Back** to return to the Macro Sequence List window.

Assign Unassigned Items to a Location

Use this procedure to assign locations to items that have no locations assigned yet.

Navigate: Main Menu > Inventory Mgmt > Sequencing. The Macro Sequence List window opens.

To assign unassigned items to locations, follow these steps:

- To view items that are not assigned to a location, double-click the No Location line. The No Location List window opens.

Figure 13–5 No Location List Window

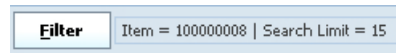
Item	Item Description	Location	Capacity	Width	UOM	Label Format	Label Qty
100147020	Item3:Green:Raspberry:Small6...	No Location	0	0	Units	Shelf Label	1
100143794	Item2:Yellow:Raspberry:Extra L...	No Location	0	0	Units	Shelf Label	1
100143787	Item2:Yellow:Raspberry:Large...	No Location	0	0	Units	Shelf Label	1
100230008	g2 deposit content with deposit...	No Location	0	0	Units	Shelf Label	1
100181213	06142011 Test Parent Item:Bro...	No Location	0	0	Units	Shelf Label	1
100135308	Tide Extra White	No Location	0	0	Units	Shelf Label	1
100139325	Parent Item:Brown:Raspberry:...	No Location	0	0	Units	Shelf Label	1
100176308	06102011 Pack 1	No Location	0	0	Units	Shelf Label	1
100177107	PAV REG ITEM BA	No Location	0	0	Units	Shelf Label	1
100177207	PAV SMP PCK ITEM	No Location	0	0	Units	Shelf Label	1
100177308	Simple Pack Not RJ	No Location	0	0	Units	Shelf Label	1
100182409	Yas reg item SIMPLER rate N a...	No Location	0	0	Units	Shelf Label	1
100182410	Yas SP for the SOM not RJ	No Location	0	0	Units	Shelf Label	1
100244331	NITHIN_A_Simple Pack_Item_1...	No Location	0	0	Units	Shelf Label	1
100244332	NITHIN_A_Pack_Item_100244332	No Location	0	0	Units	Shelf Label	1
100139665	Parent Item:Green:Gooseberry:...	No Location	0	0	Units	Shelf Label	1
100243008	Parent Item:Green:Gooseberry:...	No Location	0	0	Units	Shelf Label	1
100044093	PD	No Location	0	0	Units	Shelf Label	1

- If you want to limit the items displayed in the list, click **Filter**. See “[Filter the No Location List](#)” for more information.
- Select an item that you want to assign to a location.
- Update the fields:
 - Location** – Select a location from the drop-down list.
 - Label Format** – Select the kind of shelf label from the drop-down list.
 - Label Qty** – Enter the number of labels to print.
- Click **Save** to return to the Macro Sequence List window.

Filter the No Location List

At any time while the No Location List window is open, click **Filter** to change how the list is filtered.

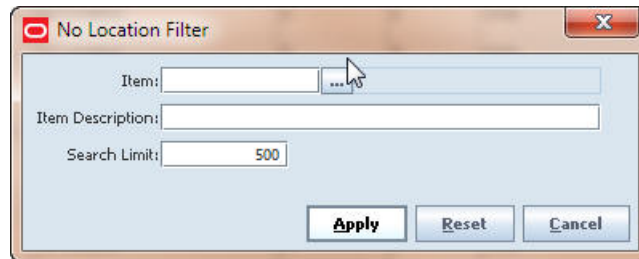
Current filtering is displayed next to the Filter button on the No Locations List window. If no filtering is displayed, all items are currently selected and listed.



To filter the items listed on the No Location List window, follow these steps:

1. Click **Filter**. The No Location Filter window opens.

Figure 13–6 No Location Filter Window



2. If you want to reset all filtering criteria to default values, click **Reset**.
3. Enter or select filtering criteria as needed to select just the items you want to list. All criteria are optional. If you leave a field blank, all values will be included in your filtering selection.

Item – Enter the item number or click the **Ellipsis** button to look up the item

In the Item Lookup window, locate the item you want and select it. Click **Apply** to return to the No Location Filter window. See “Item Lookup” in [Chapter 20](#) for more information.

Item Description – Enter an item description to select only the items with this description.

4. Enter a **Search Limit** value to limit the number of items displayed on the No Location List window. The default is 500.
5. Click **Apply**. The items you have specified are listed in the No Location List window.

Add an Item to a Location

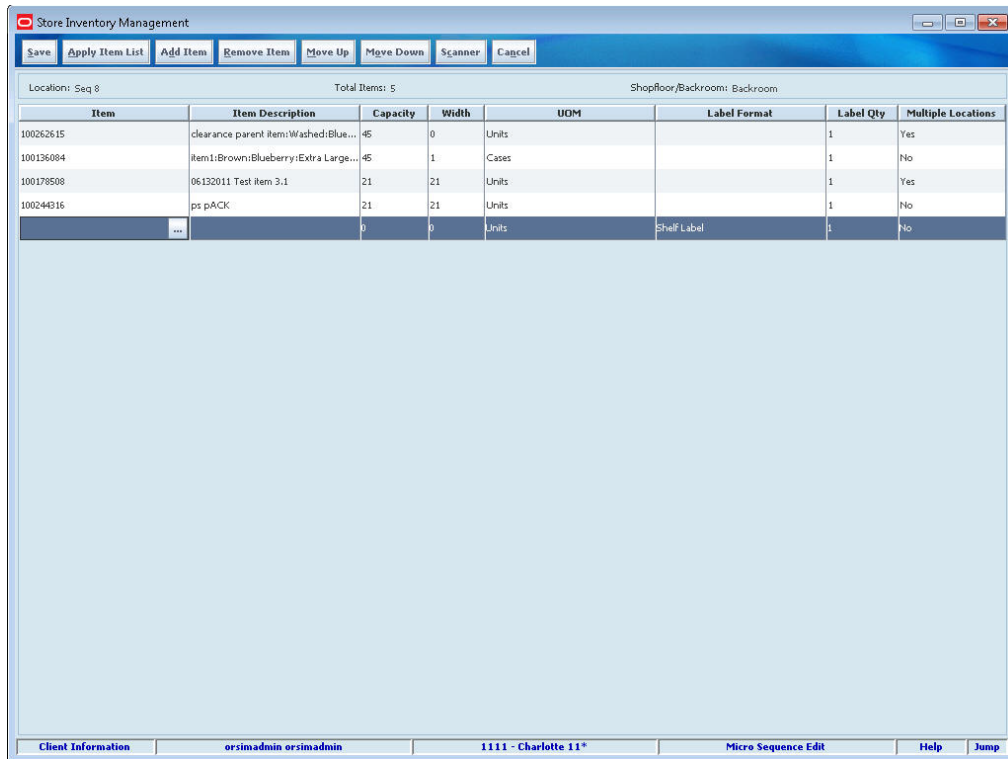
Use this procedure to add an item to a particular location.

Navigate: Main Menu > Inventory Mgmt > Sequencing. The Macro Sequence List window opens.

To add an item to a location, follow these steps:

1. Double-click the location where you want to add an item. The Micro Sequence List window opens.
2. Click **Edit Items**. The Micro Sequence Edit window opens.

Figure 13–7 Micro Sequence Edit Window



3. Click **Add Item**. A new blank line is displayed at the bottom of the list. Or click **Scanner** to scan the item. See “Scan an Item (Scanner Button)” in Chapter 2 for more information.
4. Update the fields:
 - Item** – Enter the item number or click the **Ellipsis** button to look up the item.
In the Item Lookup window, locate the item you want and select it. Click **Apply** to return to the Micro Sequence Edit window. See “Item Lookup” in Chapter 20 for more information.
 - Capacity** – Enter the quantity of the item that can fit on the shelf at this location.
 - Width** – Enter the number of items that can fit horizontally across the shelf at this location.
 - UOM** – From the drop-down list, select Units or Cases.
 - Label Format** – Select the kind of shelf label from the drop-down list.
 - Label Qty** – Enter the number of labels to print.
5. Click **Save**. The new item is displayed in the Micro Sequence List window.
6. Click **Back** to return to the Macro Sequence List window.

Edit Items at a Location

Use this procedure to edit location information about items at a particular location.

Navigate: Main Menu > Inventory Mgmt > Sequencing. The Macro Sequence List window opens.

To edit item location information, follow these steps:

1. Double-click the location for which you want to edit items. The Micro Sequence List window opens.
2. Click **Edit Items**.
3. If necessary, click **Apply Item List** to add all items associated with the class location.

Note: Items from the class are applied only if the location was created through the **Apply Class List** button on the Macro Sequence Edit Screen. See "[Edit a Location](#)" for more information.

4. Select the item, or click **Scanner** to scan the item. See "[Scan an Item \(Scanner Button\)](#)" in [Chapter 2](#) for more information.
5. For each item that you want to edit, change item or location information by updating these fields:
 - Capacity** – Enter the quantity of the item that can fit on the shelf at this location.
 - Width** – Enter the number of items that can fit horizontally across the shelf at this location.
 - UOM** – From the drop-down list, select the unit of measure.
 - Label Format** – Select the kind of shelf label from the drop-down list.
 - Label Qty** – Enter the number of labels to print.
 - Multiple Locations** – Select Yes if the item is sequenced in more than one location in the store. Select No if the item is sequenced in only one location.
6. To change the location of an item:
 - a. Select the item that you want to move.
 - b. Click **Move Up** or **Move Down**.
7. Click **Save**. Your changes are displayed on the Micro Sequence List window.
8. Click **Back** to return to the Macro Sequence List window.

Delete Items from a Location

Use this procedure to delete items from a particular location.

Navigate: Main Menu > Inventory Mgmt > Sequencing. The Macro Sequence List window opens.

To delete items, follow these steps:

1. Double-click the location from which you want to delete items. The Micro Sequence List window opens.
2. Click **Remove Item**. The Micro Sequence Edit window opens.
3. Select the items that you want to delete.
4. Click **Delete**. This message is displayed: "Are you sure you want to delete the selected items now?"
5. Click **Yes**. The selected items are removed from the location list.

6. Click **Save** to return to the Micro Sequence List window.
7. Click **Back** to return to the Macro Sequence List window.

Print Shelf Edge Labels

Use this procedure to print labels for one or more locations.

Navigate: Main Menu > Inventory Mgmt > Sequencing. The Macro Sequence List window opens.

To print labels, follow these steps:

1. Select one or more locations for which you want to print labels.
2. Click **Print**. This message is displayed: "Are you sure you want to print shelf edge labels for all items in the locations selected?"
3. Click **Yes**. The labels are printed.

Stock Counts

Stock counts are the principal tools to ensure that the perpetual inventory for a store remains accurate. For maximum flexibility in performing stock counts, SIM allows these types of stock counts:

- **Unit**

Unit stock counts are scheduled counts that update the Oracle Retail Merchandising System (RMS) and SIM inventory positions, but only for the physical count quantities. These counts are performed on regular schedules.

- **Unit and Amount**

A Unit and Amount count is an typically an annual or semi-annual count that can be used to adjust the financial systems in a corporate merchandising system, in addition to updating inventory positions in SIM.

- **Problem Line**

Problem Line stock counts are similar to Unit counts. Problem Line product groups use predefined criteria to identify problem items. For example, you might use a Problem Line count for all of the items that have negative stock on hand quantities.

- **Ad Hoc**

An Ad Hoc stock count is an unscheduled stock count that is initiated on the handheld device. An Ad Hoc count is similar to a Unit count, but the items are not preassigned and there is no schedule.

Each stock count must be generated, except for Ad Hoc stock count type. To generate a stock count, you must first create a product group and schedule the product group. Product groups can include particular inventory items or entire segments of the item hierarchy, including all items in a store. See [Chapter 3, "Product Groups"](#) for information about how to create product groups for the different types of stock counts.

Stock Count Process

The general process to conduct a stock count in SIM is as follows:

1. Create the stock count product group. (See [Chapter 3, "Product Groups."](#))
2. Schedule the stock count. (See [Chapter 4, "Product Group Scheduler."](#))
3. Perform the stock count using handheld devices or the PC, or both.
4. Recount discrepant items (depending on whether the product group requires a recount).
5. Review the count information and authorize the count quantities.

The following diagram illustrates the general process flow.



This chapter is organized as follows:

- [Using the Stock Counts Interface](#)
- [Filter the Stock Count List](#)
- [View Future Stock Counts](#)
- [Print or Export a Stock Count Report](#)
- [Execute a Stock Count](#)
 - [Take a Snapshot](#)
 - [Enter Stock Count Results](#)
 - [Enter Recount Results](#)
 - [Complete a Child Stock Count](#)
 - [Authorize a Stock Count](#)
- [View and Update Rejected Items](#)
- [Delete Stock Counts](#)

Reference Topics

The following topics provide background information about the SIM stock count process. Review these topics as needed as you are performing a stock count:

- [“Stock Count Status”](#)
This topic describes the actions and events that occur during a SIM stock count, and how they affect the status of the stock count.
- [“Product Group Size Limits” in Chapter 3](#)
This topic describes the process that SIM uses to break large stock counts into multiple child counts so that they are more manageable.

Using the Stock Counts Interface

This section is an introduction to the SIM stock counts interface. It describes the SIM windows that you use for stock counts, and how to navigate through the interface. Before you begin to execute stock counts, you should become familiar with the interface.

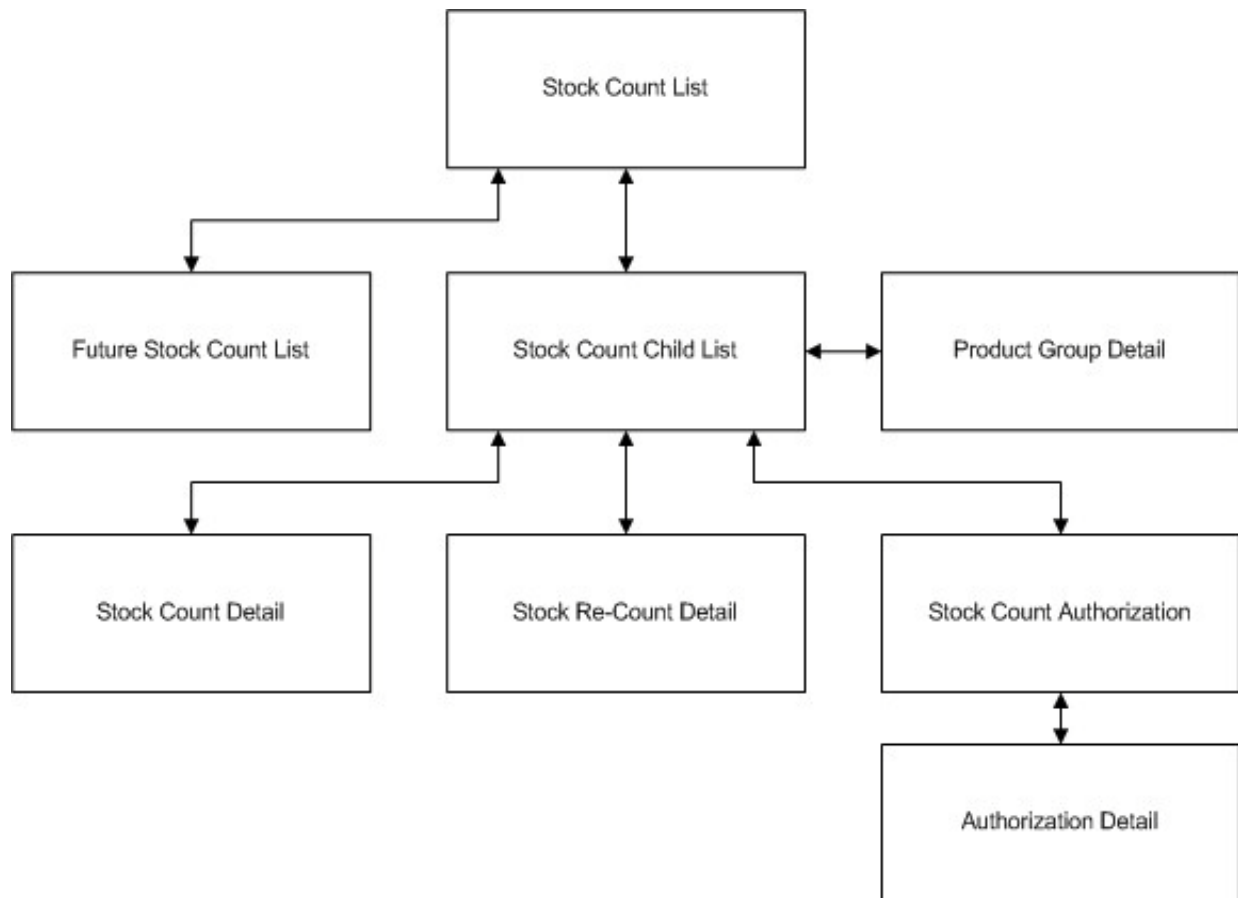
This section describes:

- The stock counts windows and what they contain
- The actions you can take in each window

Detailed procedures to execute stock counts are later in this chapter; see [“Execute a Stock Count.”](#)

The following figure shows the stock counts windows and how you navigate among them.

Figure 14–1 Stock Counts Windows



This section describes the following stock counts windows:

- [Stock Count List Window](#)
- [Child Stock Count List Window](#)
- [Stock Count Detail Window](#)
- [Stock Re-Count Detail Window](#)
- [Stock Count Authorization Window](#)

Other stock counts windows are described in the procedures in which you use them.

Note: To access some stock count windows and functions, you must have the necessary permissions. Access to some windows and functions depends on the status of a stock count. For example, you cannot access the Stock Count Authorization window until the stock count status indicates that it is ready to be authorized.

Stock Count List Window

The Stock Count List window is the entry point into stock counts. It lists the currently active SIM stock counts of all types.

Navigate: Main Menu > Inventory Mgmt > Stock Counts. The Stock Count List window opens.

Figure 14–2 Stock Count List Window

Count ID	Count Description	Count Group	Date	Type	Status	Items Left To Count
122	M3M Duplicate	M3M Duplicate	9/26/12	Stock Count	In Progress	3
383	36-C	36-C	2/19/13	Authorize	In Progress	0
605	Defect 459	Defect 459	3/6/13	Stock Count	New	6
781	Guided All	Guided Location All	3/12/13	Stock Count	New	268
884	Department Unguided All	Department Unguided	3/21/13	Stock Count	New	264
882	Component 2	Component 2	3/21/13	Stock Count	In Progress	2
883	Component 1	Component 1	3/21/13	Stock Count	In Progress	1
885	Unguided all None	Sue Unguided All test	3/21/13	Stock Count	In Progress	263
886	component 1 by dept	Component 1 By Dept	3/21/13	Stock Count	In Progress	2
901	Hierarchy	Unit Ung- Hier	3/21/13	Stock Count	In Progress	3
902	Hierarchy- Department	Hierarchy- Department	3/21/13	Stock Count	New	3
1341	Unit Guided All Dept	Unit G- All dept	4/23/13	Stock Count	In Progress	308
1361	Ung All depart	PR- UNG: All	4/24/13	Stock Count	In Progress	30
1421	Unit Guided- Non- Sellable	Unit Guided	4/25/13	Stock Count	In Progress	0
1462	Recount Test	Test 14 digit Item	4/30/13	Authorize	New	0
1461	Another Schedule	Test 14 digit Item	4/30/13	Stock Count	In Progress	0

If you want to filter the Stock Count List, click **Filter**. See “[Filter the Stock Count List.](#)”

Window Content

The **Items Left to Count** field displays the total number of items left to be counted at the store. If every item has been counted for every stock count, the Total Items field will show zero.

Each stock count listed in the Stock Count List window is a master stock count that has one or more child stock counts. Large stock counts are automatically divided into multiple child counts, which are listed in the Child Stock Count List window.

The Stock Count List window columns are as follows:

Column	Description
Count ID	A unique numeric identifier assigned by SIM.
Count Description	The description of the product group schedule that was entered when the schedule was set up. For an Ad Hoc stock count, the description is the ID of the user who created the stock count.
Count Group	The description of the product group that was entered when the product group was set up. For an Ad Hoc stock count, the Count Group value is Ad Hoc.
Date	The date for which the stock count is scheduled.
Type	The stage the stock count is in: Authorize, Re-Count, or Stock Count.
Status	The status of the stock count: Active, Completed, In Progress, New, or Processing.
Items Left to Count	The items in the stock count that remain to be counted or authorized.

Actions You Can Take

In the Stock Count List window, you can do the following:

Action	Method	Reference
Access child counts for a stock count	Double-click a stock count	“ Child Stock Count List Window ”
Print a Stock Count Detail report	Print button	“ Print or Export a Stock Count Report ”

Action	Method	Reference
Delete stock counts	Delete button	“Delete Stock Counts”
View future stock counts	Future Stock Counts button	“View Future Stock Counts”
View rejected items for a third-party stock count	Rejected Items button	“View and Update Rejected Items”
Refresh the Stock Count List display	Refresh button	- - -

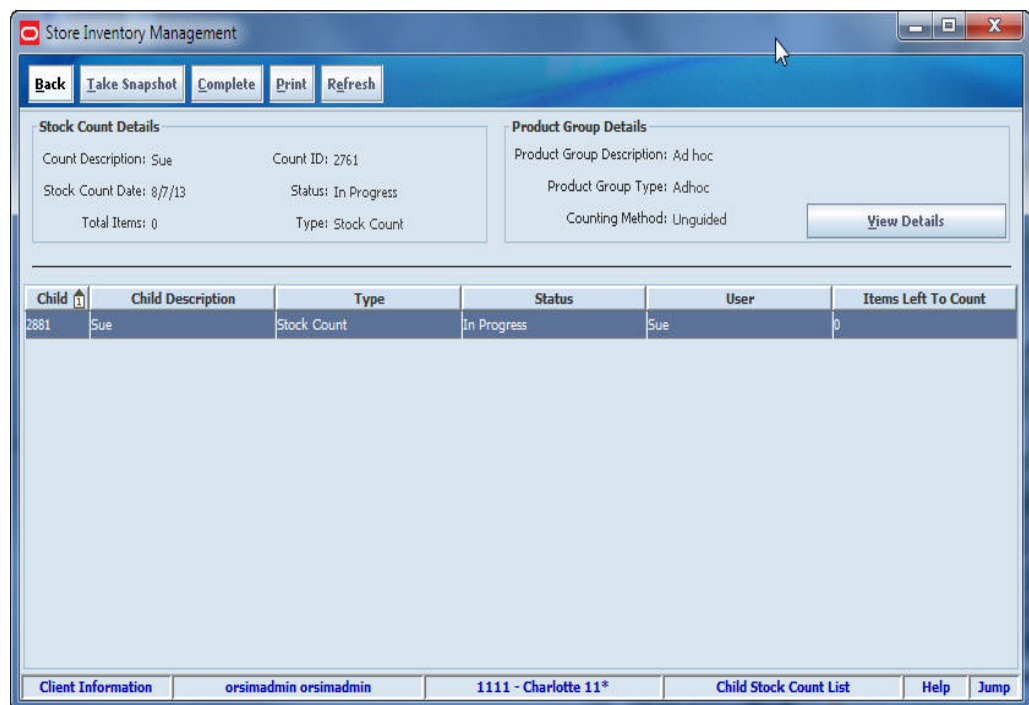
Child Stock Count List Window

Every master stock count has one or more child counts. A master count with fewer items might have only one child count, but a large count might be split into a number of smaller and more manageable child counts. You can work with each child count separately. Details about the items in a stock count are in the child count records.

Navigate: Main Menu > Inventory Mgmt > Stock Counts. The Stock Count List window opens.

Double-click on the stock count you want to access. The Child Stock Count List window opens.

Figure 14–3 Child Stock Count List Window



Window Content

The top of the window displays information about the master stock count and the stock count product group, as displayed on the Stock Count List window.

The Child Stock Count List window columns are as follows:

Column	Description
Child Description	<p>A description that depends on the type of stock count:</p> <ul style="list-style-type: none"> For any guided stock count, the child description is based on the locations set up in macro sequencing. See “Sequencing” for details about how locations are managed. If there is only one unguided child count associated with the master count, the name is the same as the master count. For multiple child stock counts that belong to a large master stock count, “(x/y)” is appended to the description of each child count to indicate the number of child stock counts that belong to the master count (y), and the position in the sequence for each child count (x). See “Product Group Size Limits” in Chapter 3 for details about how large stock counts are divided into multiple child counts. For a stock count broken down by hierarchy, the name is based on the hierarchy. The count might be further broken down into numbered parts. For a third-party count, the description is based on the department breakdown of the count, or on the hierarchy breakdown selected when the product group was set up.
Area	Shopfloor, Backroom, or No Location. (This column does not appear for unguided counts.)
Type	<p>Future Stock Count, Stock Count, Re-count, or Authorize.</p> <p>For more information about stock count stages and statuses, see “Stock Count Status.”</p>
Status	<p>New, In Progress, Pending, Completed, or Confirmed.</p> <p>For a Future Stock Count type, this value is N/A. Confirmed status applies only to Unit and Amount count type.</p>
User	The user who counted the location or child stock count. This value is the user who last saved the count. If the child count has not been counted yet, no value is shown.
Items Left to Count	The number of items that remain to be counted in the child count.

Actions You Can Take

In the Child Stock Count List window, you can do the following:

Action	Method	Reference
Access details of a child count	Double-click a child count	“Stock Count Detail Window”
Print a Stock Count Detail report	Print button	“Print or Export a Stock Count Report”
Take a snapshot of inventory positions for items in the stock count	Take Snapshot button	“Take a Snapshot”
Complete the child count	Complete button	“Complete a Child Stock Count”
Access the Stock Count Authorization window (to authorize a stock count)	Authorize button	“Stock Count Authorization Window”
Access the rejected items	Rejected Items button	View and Update Rejected Items

Action	Method	Reference
Update authorized quantities for selected child counts	Update Auth Qty button	“Other Methods to Update Authorized Quantities”
Update all authorized quantities for all child counts	Confirm Authorization button	“Other Methods to Update Authorized Quantities”
Refresh the Child Stock Count List display	Refresh button	- - -
View details of the stock count product group	View Details button	“View Product Group Details”

Stock Count Detail Window

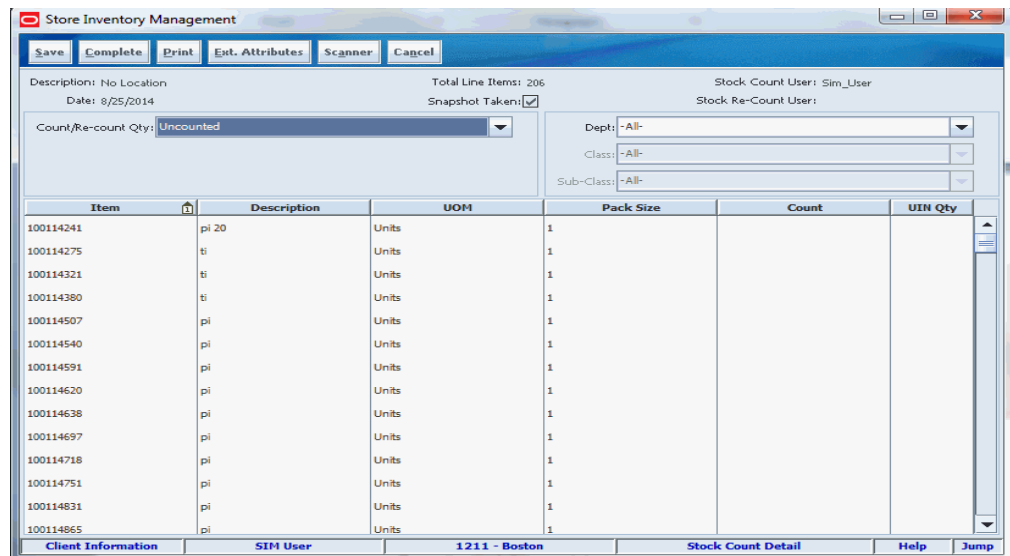
In the Stock Count Detail window, you can view and update count quantities for the child count you have selected.

Navigate: Main Menu > Inventory Mgmt > Stock Counts. The Stock Count List window opens.

1. Double-click on the stock count you want to access. The Child Stock Count List window opens.
2. Double-click on the child count you want to access. The Stock Count Detail window opens.

Note: If the stock count is currently being recounted, the Stock Re-Count Detail window opens instead; see [“Stock Re-Count Detail Window.”](#)

Figure 14–4 Stock Count Detail Window



Window Content

The Stock Count Detail window displays the child stock count description, scheduled date, and user information, as well as the following fields:

Field	Description
Total Line Items	The total number of items (rows) currently displayed, depending on how the list is filtered. (Use of the filter fields is described in “Enter Stock Count Results.”)
Snapshot Taken	Indicator of whether a snapshot has been taken for this child count. (See “Take a Snapshot” for more information.)

By default, uncounted items are listed. You can use the **Count/Re-count Qty**, **Dept**, **Class**, and **Sub-Class** fields to control which items are listed in the window.

The columns of the Stock Count Detail window are as follows:

Column	Description
Sequence ID	For guided counts that use sequencing, the ID of the location of the item. For guided counts, the list is sorted by Sequence ID. For unguided counts, this column does not appear.
Item	The item ID.
Description	The item description.
UOM	The unit of measure for the item.
Pack Size	The number of packs in a case.
Count	The counted quantity of the item, if the item has been counted during this stock count.
UIN Qty	The number of unique identification numbers (UIN) counted.

Actions You Can Take

In the Stock Count Detail window, you can do the following:

Action	Method	Reference
Enter stock count results	(See procedure)	“Enter Stock Count Results”
Update unique identification numbers (UIN)	(See procedure)	“Update UINs for a Count”
Print a Stock Count Detail report	Print button	“Print or Export a Stock Count Report”
Exit and save updates	Save button	---
Enter extended attributes	Ext. Attributes button	Enter Extended Attributes
Scan or Enter a barcode	Scanner button	Scan an Item (Scanner Button)
Exit without saving updates	Cancel button	---
Complete the count	Complete button	“Complete a Child Stock Count”

Note: You cannot complete the count until the snapshot is taken.

Stock Re-Count Detail Window

In the Stock Count Detail window, you can view and update recount quantities for the child count you have selected. If you selected a stock count that is being recounted, the Stock Re-Count Detail window opens.

Note: Recounts are performed only when the stock count product group is set up to require recounts of discrepant items. Recounts do not apply to any third-party or ad hoc stock counts.

Navigate: Main Menu > Inventory Mgmt > Stock Counts. The Stock Count List window opens.

1. Double-click on the stock count you want to access. The Child Stock Count List window opens.
2. Double-click on the child count that you want to access. The Stock Re-Count Detail window opens.

Figure 14–5 Stock Re-Count Detail Window

Store Inventory Management

Save Complete Print Scanner Cancel

Description: Print Recount test a - No Location Total Line Items: 47 Stock Count User: Sue
 Date: 8/8/13 Snapshot Taken: Stock Re-Count User: Sue

Count/Re-count Qty: Uncounted Dept: -All-
 Filter: Discrepant Items Class: -All-
 Sub-Class: -All-

Item	Description	UOM	Pack Size	Original Count	Re-Count Qty	UIN Qty
100135307	Tide Extra	Units	1			0
100135308	Tide Extra White	Units	1			0
100137907	Dryel	Units	1			0
100140907	Parent Item	Units	1			0
100144207	04272011 test 1	Units	1			0

Client Information orsimadmin orsimadmin 1111 - Charlotte 11* Stock Re-Count Detail Help Jump

The Stock Re-Count Detail window is similar to the Stock Count Detail window, but it also allows entry of recounted item quantities.

Window Content

The Stock Re-Count Detail window displays the child stock count description, scheduled date, and user information, as well as the following fields:

Field	Description
Total Line Items	The total number of items (rows) currently displayed, depending on how the list is filtered. (Use of the filter fields is described in “Enter Stock Count Results.”)
Snapshot Taken	Indicator of whether a snapshot has been taken for this child count. (See “Take a Snapshot” for more information.)

By default, uncounted discrepant items are listed. You can use the **Count/Re-count Qty**, **Filter**, **Dept**, **Class**, and **Sub-Class** fields to control which items are listed in the window.

The columns of the Stock Re-Count Detail window are as follows:

Column	Description
Sequence ID	For guided counts that use sequencing, the ID of the location of the item. For guided counts, the list is sorted by Sequence ID. For unguided counts, this column does not appear.
Item	The item ID.
Description	The item description.
UOM	The unit of measure for the item.
Pack Size	The number of packs in a case.
Original Count	The counted quantity of the item from the original count.
Re-Count Qty	The recounted quantity of the item, if the item has been recounted yet.
UIN Qty	The number of unique identification numbers (UIN) counted.

Actions You Can Take

From the Stock Re-Count Detail window, you can do the following:

Action	Method	Reference
Print a Stock Count Detail report	Print button	“Print or Export a Stock Count Report”
Enter stock recount results	(See procedure)	“Enter Recount Results”
Update unique identification numbers (UIN)	(See procedure)	“Update UINs for a Count”
Complete the child stock count	Complete button	“Complete a Child Stock Count”
Exit and save updates	Save button	---
Scan or Enter a Barcode	Scanner button	Scan an Item (Scanner Button)
Exit without saving updates	Cancel button	---

Stock Count Authorization Window

The Stock Count Authorization window is available for a child stock count after the count is completed. In this window, you can review count and recount quantities and enter authorized (approved) count quantities for items. When you have updated authorized quantities, you can confirm the authorization to finish the stock count process. SIM automatically creates inventory adjustment transactions to reconcile SIM inventory positions with authorized quantities for counted items.

Note: SIM provides the option to set up stock counts with automatic authorization. This means that the count is authorized automatically after it is completed, and there is no separate authorization procedure.

Figure 14–6 Stock Count Authorization Window
Window Content

At the top, the Stock Count Authorization window displays the child stock count description, scheduled date, and user information. The table lists the items and contains the following columns:

Column	Description
Item	SIM item ID
Description	Item description
UOM	Item unit of measure
Count Qty	Original count quantity
Cnt Var	Original count variance from the snapshot quantity
Cnt Var %	Original count variance percent
Re-Count Qty	Recount quantity (if a recount was required)
Rcnt Var	Recount variance from the snapshot quantity
Rcnt Var %	Recount variance percent
SOH	SIM stock on hand
Authorized Qty	Authorized quantity for the item
UIN Qty	Number of UINs counted

Actions You Can Take

From the Stock Count Authorization window, you can do the following:

Action	Method	Reference
Review quantities and enter authorized quantities manually	(See procedure)	“Update Authorized Quantities Manually”
Update unique identification numbers UIN	Authorization Detail window	“Update UINs before Authorizing”

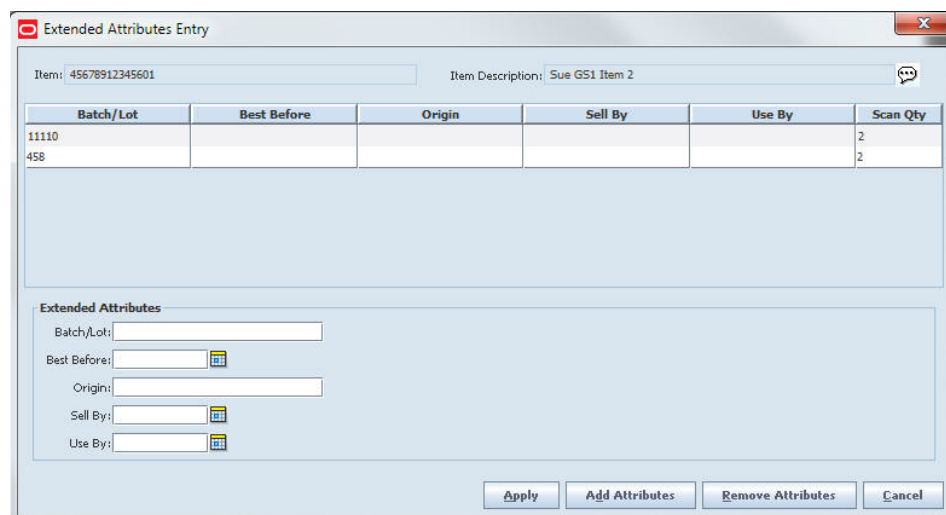
Action	Method	Reference
Select a child count (if more than one child count)	Child Stock Count controls	“Update Authorized Quantities Manually”
Filter the items listed by their current state	Filter controls	“Update Authorized Quantities Manually”
Filter the items listed by additional criteria you specify	Advanced Filter button	“Filter the Stock Count Authorization List”
Update all blank authorized quantities	Update Auth Qty button	“Other Methods to Update Authorized Quantities”
Update the stock count with any late sales that were uploaded since entering the authorization stage. This will update the snapshot and, in turn, mark an item as discrepant or non-discrepant	Update Snapshot button	View Count Detail
Confirm the authorization	Confirm Child button	“Authorize a Stock Count”
Save updates (without exiting)	Save Child button	---
Exit without saving updates	Back button	---
View the detail of the count	Count Detail button	View Count Detail

Enter Extended Attributes

This window is used to enter additional details about the stock count in the Extended Attributes window.

To update the Extended Attributes, select a row and click **Ext. Attributes**. The Extended Attributes window opens. This window captures additional information about an item.

Figure 14–7 Extended Attributes Entry Window



Note: The Extended Attributes Entry window view may vary, depending upon customer chosen attributes.

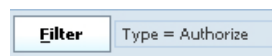
- Enter/select the field options.
- Click **Add Attributes** to add the additional attributes to the item.
- Click **Apply** to save the changes and return to the previous window.

View Count Detail

From the Stock Count Authorization window, click **Count Detail**. The detail window opens. This is a view only window. Click **Close** to return to the Stock Count Authorization window.

Filter the Stock Count List

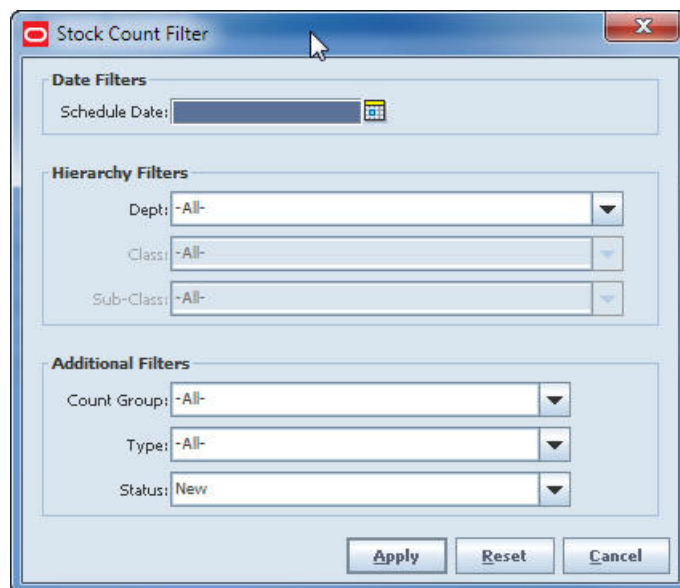
Whenever the Stock Count List window is displayed, you can filter the list of stock counts to limit which stock counts are displayed. If the list is currently filtered, the filtering is shown next to the Filter button.



To filter the list of stock counts or to change the current filtering, follow these steps:

1. In the Stock Count List window, click **Filter**. The Stock Count Filter window opens.

Figure 14–8 Stock Count Filter Window



2. Enter or select search values as needed to specify the stock counts that you want to list. All values are optional. If you leave a field blank or select All, all values are included in the search.

Date Filters – In the **Schedule Date** field, enter or select the schedule date of the stock counts you want to list.

Hierarchy Filters – For the **Dept**, **Class**, and **Sub-Class** fields, select the merchandise hierarchy for which you want to list stock counts.

Count Group – Select the stock count group (product group) for which you want to list stock counts.

Type – Select Stock Count, Re-Count, Authorize, or All (default).

Status – Select Active, Completed, In Progress, New, Processing, or All (default).

3. Click **Apply**. You return to the Stock Count List window, where your filter has been applied.

View Future Stock Counts

Future stock counts are stock counts for which the scheduled date has not yet arrived and have not been extracted yet for execution. This means these future stock counts should only be used for planning, not execution. You can view future stock counts, and you also have the option to extract a count to view its details.

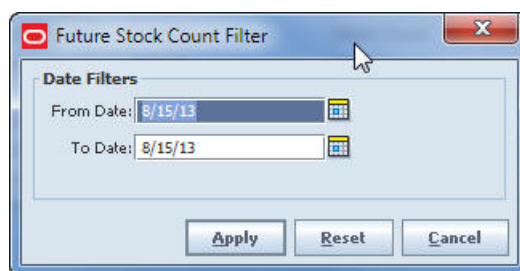
For stock counts that are extracted before the scheduled stock count date, you cannot take any action on the count. Until the scheduled date is reached, you can view future stock counts in the Future Stock Counts List window. These stock counts have no status. When the scheduled date is reached, SIM deletes the future stock count values and extracts the count again with the real stock count ID. The stock count then moves to the Stock Count List window, and its status changes to Stock Count New.

Navigate: Main Menu > Inventory Mgmt > Stock Counts. The Stock Count List window opens.

To view future stock counts, follow these steps:

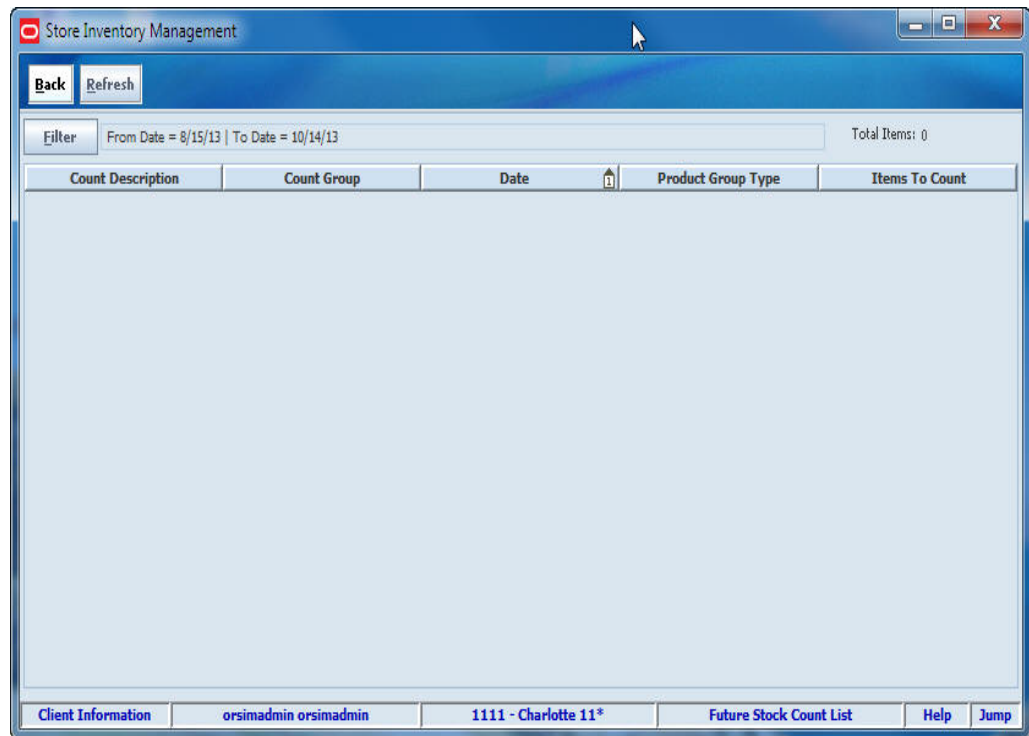
1. Click **Future Stock Counts**. The Future Stock Count Filter window opens.

Figure 14–9 Future Stock Count Filter Window



2. In the **From Date** and **To Date** fields, enter or select dates to set the date range of the future stock counts you want to list. (Click **Reset** if you want to clear the date fields.)
3. Click **Apply**. The Future Stock Count List window opens.

Figure 14–10 Future Stock Count List Window



The **Total Items** field displays the total number of items to count in all stock counts listed.

The Future Stock Count List window columns are as follows:

Field	Description
Count Description	The description of the product group schedule that was entered when the schedule was set up.
Count Group	The description of the product group that was entered when the product group was set up.
Date	The date for which the stock count is scheduled.
Product Group Type	The type of stock count product group: Unit, Unit and Amount, or Problem Line.
Items to Count	The number of items to be counted in the stock count.

4. If you want to extract a future stock count now, follow these steps:
 - a. Double-click the stock count that you want to extract.
A message is displayed: "Do you want to generate the future stock count now?"
 - b. Click **Yes** to extract the selected stock count. The Child Stock Count List window opens, with the generated stock count listed.
 - c. To view the details of the stock count, double-click on the count to open it in the Stock Count Detail window. You cannot enter any count quantities or take any action on the count.
 - d. Click **Back** to return to the Future Stock Count List window.

5. Click **Back** to return to the Stock Count List window.

Print or Export a Stock Count Report

You can view, print, or export stock count reports at any time, for reference or as an aid to completing the count.

Note: You can print reports from the Stock Count List window, Child Stock Count List window, or Stock Count Detail window.

Navigate: Main Menu > Inventory Mgmt > Stock Counts. The Stock Count List window opens.

To view or print a stock count report, follow these steps:

1. Select the stock count for which you want a report.
2. Click **Print**. The Report Selection window opens.
3. Select the report you want to produce.
4. In the **Printer** field, select the printer or other output device that you want to use.
5. Click **OK**. The report is produced.

Stock Count Detail Report

The Stock Count Detail report lists the following information for the selected stock count:

- Item number
- Description
- Unit of measure
- Counted quantity
- Authorized quantity
- Recount quantity

Stock Count Export Report

The Stock Count Export report is primarily designed for use with third-party stock counts, although it can be used for any type of stock count. The report can be modified as required and exported in XML format for interface to a third-party system.

It is assumed that this report will be generated after the snapshot is taken for a stock count. If this report is generated before the snapshot is taken, the unique identification numbers (UIN) and snapshot quantity fields are empty.

The standard report includes the following information:

- Header: Stock count ID, stock count type, store ID
- Detail: Item number, item description, item snapshot quantity, item UINs

Execute a Stock Count

The steps to execute a stock count from start to finish are as follows:

1. [Take a Snapshot](#)
2. [Enter Stock Count Results](#)
3. [Enter Recount Results](#)
4. [Complete a Child Stock Count](#)
5. [Authorize a Stock Count](#)

Take a Snapshot

After you have located the stock count that you want to execute, one of the first steps is to take a snapshot. When you take a snapshot, SIM records the stock on hand position for each item in the count at that point in time. These values are compared against the counted values to determine whether there are discrepant items. After the snapshot is taken, you can continue business without having to update the counted quantities with any transactions. This preserves the original counted quantities for an audit, if you want to conduct an audit.

The stock count status changes to In Progress when you take a snapshot or begin counting items.

When Snapshots Are Taken

The point at which a snapshot is taken depends on the type of stock count. Taking the snapshot affects the status of each stock count.

Note: For a stock count that uses a counting method of Third-party, you must take the snapshot before the stock count data is uploaded to SIM.

Ad Hoc Stock Counts

For an Ad Hoc stock count, SIM takes a snapshot when the first item is scanned on the handheld device. (There is no product group for an Ad Hoc stock count.)

Unit and Problem Line Stock Counts

For Unit and Problem Line stock count types, SIM takes a snapshot when the first item is scanned on the handheld device. You can also take a snapshot for child counts by using the Take Snapshot button on the Child Stock Count List window, Stock Count Detail window, or Stock Re-count Detail window (for a recount). You cannot enter quantities until the snapshot has been taken.

Unit and Amount Stock Counts

For a Unit and Amount count, the snapshot must be taken from the PC. It is not possible to take a snapshot for a Unit and Amount count type on the handheld device. If your store uses unique identification numbers (UIN), the snapshot must be taken before the count can begin. If your store does not use UINs, you can start a count on the handheld without having taken the snapshot.

When a snapshot is taken for a Unit and Amount count type, it is taken for all child counts at the same time. Only one snapshot is taken for a Unit and Amount count type. There is no separate snapshot for a recount.

None of the individual child counts can move to Re-Count or Authorize stage until the snapshot has been taken.

Take the Count Snapshot

The initial snapshot for a stock count can be taken in either of these ways:

- [From the Child Stock Count List Window](#)
- [From the Stock Count Detail Window](#)

From the Child Stock Count List Window

Navigate: Main Menu > Inventory Mgmt > Stock Counts. The Stock Count List window opens.

To take the snapshot, follow these steps:

1. If you want to filter the Stock Count List, click **Filter**. See "[Filter the Stock Count List](#)."
2. Double-click on the stock count for which you want to take a snapshot. The Child Stock Count List window opens.
3. Select the child counts for which you want to take snapshots.

Note: For Unit and Amount counts, the snapshot is taken for *all* child counts, regardless of the counts selected in the list. A Monitor window opens to inform you that the snapshot is being taken. You can close the Monitor window and continue with other SIM tasks. (If you do not close the window, it closes automatically when snapshot processing is completed.)

4. Click **Take Snapshot**.
5. Click **Done** to return to the Stock Count List window.

From the Stock Count Detail Window

Navigate: Main Menu > Inventory Mgmt > Stock Counts. The Stock Count List window opens.

To take the snapshot, follow these steps:

1. Double-click on the stock count for which you want to take a snapshot. The Child Stock Count List window opens.
2. Double-click on the child count for which you want to take a snapshot. The Stock Count Detail window opens.
3. Click **Take Snapshot**.
4. Click **Back** to return to the Stock Count Detail window.

If you want to start entering stock count quantities, see "[Enter Stock Count Results](#)."

Snapshots for Recounts

After a count is completed, SIM performs variance calculations for all items. If the count for an item exceeds variance limits, the item count is discrepant. If the product group setup requires a recount of discrepant items, you follow the same steps to take a snapshot. The recount snapshot records the current stock on hand levels for all the items on the recount.

You can take a recount snapshot from either the Child Stock Count List window or the Stock Re-Count Detail window.

Note: For Unit and Amount count types, there is no snapshot taken for a recount.

Recounts are optional, depending on the product group setup. Recounts do not apply to ad hoc stock counts or third-party stock counts.

Unique Identification Numbers (UIN) Status on Snapshots

If your store uses UINs, the snapshot captures the status of those items that are in the store as part of the store's stock on hand, as well as those UINs that are in missing status:

- In Stock
- Customer Order Reserved
- Reserved for Shipping
- Unavailable
- Missing
- Removed from Inventory

The UINs in these statuses are displayed in the Stock Count Authorization window, so that you can see which UINs are not counted.

View Product Group Details

At any time when the Child Stock Count List window is open, you can click **View Details** to view detailed information about the stock count product group. (Only users with the required permissions can create and change product groups.)

Navigate: Main Menu > Inventory Mgmt > Stock Count. The Stock Count List window opens.

To view details about the product group for the child counts listed, follow these steps:

1. Double-click on the stock count for which you want to view product group details. The Child Stock Count List window opens.
2. Click **View Details**. The Product Group Detail window opens.

Figure 14–11 Product Group Detail Window

3. Click **Close** to close the window and return to the Child Stock Count List window.
4. Click **Back** to return to the Stock Count List window.

Enter Stock Count Results

When you perform a stock count, you count all stock in the store for the items. Unavailable inventory must be counted as well. For example, if some items are ready to be returned to a supplier but the return has not yet been dispatched, the items are counted, even though they will not be placed on the shop floor for sale.

For the original count and a recount (if a recount is required), the procedure is the same. For a recount, the data entry window is slightly different; see [“Enter Recount Results.”](#)

Note: For Unit and Problem Line counts, you must take the snapshot before you enter quantities.

Navigate: Main Menu > Inventory Mgmt > Stock Counts. The Stock Count List window opens.

To enter stock count results, follow these steps:

1. If you want to filter the Stock Count List, click **Filter**. See [“Filter the Stock Count List.”](#)
2. Double-click on the stock count for which you want to enter count results. The Child Stock Count List window opens.
3. If you want to view details about the stock count product group, click **View Details** in the Product Group Details section. See [“View Product Group Details.”](#)
4. Double-click on the child stock count for which you want to enter results. The Stock Count Detail window opens.
5. By default, the uncounted items in the stock count are listed. In the **Count/Re-count Qty** field, you can select which items you want to list, as follows:

- Select **Uncounted** (default) to list only those items for which no quantity has been entered in the Count field.
- Select **Counted** to list only those items for which a count has been entered.
- Select **All** to list both counted and uncounted items.

You can change these selections at any time while you are entering counts.

6. If you want to limit the items listed to those in a particular merchandise hierarchy, use the **Dept**, **Class**, and **Sub-Class** fields to select which items to list.

You can change these selections at any time while you are entering counts.

7. For each item count you want to enter, follow these steps:
 - a. In the **Count/Re-count Qty** field, double-click to activate edit mode.
 - b. Type the count value and press **Enter**.
8. If you want to update unique identification numbers (UIN), see ["Update UINs for a Count."](#)
9. When you have finished entering item counts, click **Save** to save the changes.
10. Click **Back** to return to the Child Stock Count List window.

If you have finished entering all item counts, you have the option to complete the count. See ["Complete a Child Stock Count."](#)

Enter Recount Results

If a recount is required, the procedure to enter the recount results is similar to the procedure for the original count.

Note: If you are recounting a Unit or Problem Line count, you must take a new snapshot for the recount before entering quantities. See ["Take a Snapshot."](#)

1. If you want to filter the Stock Count List, click **Filter**. See ["Filter the Stock Count List."](#)
2. Double-click on the stock count for which you want to enter recount results. The Child Stock Count List window opens.
3. If you want to view details about the stock count product group, click **View Details** in the Product Group Details section. See ["View Product Group Details."](#)
4. Double-click on the child stock count for which you want to enter recount results. The Stock Re-Count Detail window opens.
5. By default, the uncounted items in the stock count are listed. In the **Count/Re-Count Qty** field, you can select which items you want to list, as follows:
 - Select **Uncounted** (default) to list only those items for which no quantity has been entered in the Re-Count field.
 - Select **Counted** to list only those items for which a count has been entered.
 - Select **All** to list both counted and uncounted items.

You can change this selection at any time while you are entering recounts.

6. If you want to limit the items listed to those in a particular merchandise hierarchy, use the **Dept**, **Class**, and **Sub-Class** fields to select which items to list.
You can change these selections at any time while you are entering counts.
7. By default, the discrepant items from the original count are listed. In the **Filter** field, you can select which items you want to list, as follows:
 - Select **Discrepant** (default) to list only those items for which the original count was discrepant.
 - Select **All Items** to list both discrepant and nondiscrepant items.You can change this selection at any time while you are entering recounts.
8. For each item recount you want to enter, follow these steps:
 - a. In the **Re-Count Qty** field, double-click to activate edit mode.
 - b. Type the recount value and press **Enter**.
9. If you want to update unique identification numbers (UIN), see [“Update UINs for a Count.”](#)
10. Click **Save** to save the changes.
11. Click **Back** to and return to the Child Stock Count List window.

If you have finished entering all item recount quantities, you have the option to complete the count. See [“Complete a Child Stock Count.”](#)

Update UINs for a Count

If a stock count includes items that require unique identification numbers (UIN), these UINs must be scanned or entered while counting stock. You can add and delete UINs for a child count. Follow these steps:

1. In the Stock Count Detail or Stock Re-Count Detail window, double-click on the **UIN Qty** field for the item. The UIN window opens.
2. For each UIN that you need to add, click **Add** and enter a valid UIN.
3. To delete a UIN, select it and click **Remove**.
4. Click **Save** to save your changes and return.

Complete a Child Stock Count

For each child stock count, you can continue to enter and update count or recount values as needed until all the child counts have been completed. You can complete the count in either of these ways:

- [From the Stock Count Detail Window](#)
- [From the Child Stock Count List Window](#)

From the Stock Count Detail Window

Navigate: Main Menu > Inventory Mgmt > Stock Count. The Stock Count List window opens.

To complete a child count, follow these steps:

1. If you want to filter the Stock Count List, click **Filter**. See [“Filter the Stock Count List.”](#)

2. Double-click on the stock count for which you want to complete one or more child counts. The Child Stock Count List window opens.
3. Double-click the child count that you want to complete. The Stock Count Detail window opens.
4. Click **Complete**. A confirmation prompt is displayed.
5. Click **Yes**. You return automatically to the Stock Count List window.

From the Child Stock Count List Window

Navigate: Main Menu > Inventory Mgmt > Stock Count. The Stock Count List window opens.

To complete a child count, follow these steps:

1. If you want to filter the Stock Count List, click **Filter**. See "[Filter the Stock Count List](#)."
2. Double-click on the stock count for which you want to complete one or more child counts. The Child Stock Count List window opens.
3. Select the child counts that you want to complete.
4. Click **Complete**. A confirmation prompt is displayed.
5. Click **Yes**. You return automatically to the Stock Count List window.
6. Click **Save** to return to the Stock Count List window.

Status Changes

When you complete the child count or recount, the status of the child count changes as follows:

- For the original count, if any items are discrepant and no recount is required, the child count status changes to Authorize New.
- For the original count, if there are no discrepant items and no recount is required, the child count status changes to Authorize Completed.
- For the original count, if any items are discrepant and a recount is required, the child count status changes to Re-Count New.
- For a recount, the child count status changes to Authorize New if there are discrepant items. If there are no discrepant items, the status changes to Authorize Completed.
- For a guided count, if all locations for an item have not been counted when you click **Complete**, the child count status changes to Pending.
- For a Unit and Amount count, if the snapshot has not been taken when you click **Complete**, the child count status changes to Pending.

The status of the master count does not change until all child counts are completed. See "[Stock Count Status](#)" for more information.

Authorize a Stock Count

A child stock count moves to Authorize New status after the count and recount (if required) are completed and there are discrepant item counts (see "[Complete a Child Stock Count](#)."). The master stock count moves to Authorize New status when all child counts are completed.

When a stock count is ready for authorization, the last stage of the count requires entering the authorized (approved) quantities for items in the count.

Notes:

- Only users with the necessary permissions can enter and confirm authorized quantities.
 - If the product group was set up for automatic authorization of the count, these authorization procedures do not apply. The child stock counts are automatically authorized when completed, and authorized quantities are updated automatically.
-
-

At this point, some stock count quantities might match SIM inventory levels or be within the variance count or percentage set for the product group. There might also be discrepant item counts, if the recount also resulted in discrepancies. You can accept counted quantities or enter different authorized quantities for all items. If you want SIM to fill in authorized quantities for you, the quantities used are based on system settings and defaults as described in the following topics.

You can update authorized quantities using one or more of the following methods:

- [Update Authorized Quantities Manually](#)
In the Stock Count Authorization window, you can enter authorized values for any items in the count, one by one.
- [Other Methods to Update Authorized Quantities](#)
With several different methods (buttons), you can have SIM fill in any blank authorized quantities.

If a stock count contains items that require unique identification numbers (UIN), you can also add and delete UINs before you authorize the count. See [“Update UINs before Authorizing.”](#)

Update Authorized Quantities Manually

You can enter authorized quantities for any items in a stock count. For a count with many different items, you may want to enter authorized quantities only for certain items. You do not have to enter any approved quantities manually, if you prefer to use the SIM defaults for authorized quantities (see [“Other Methods to Update Authorized Quantities”](#)).

Note: You can enter some authorized quantities manually and have SIM fill in the rest of the authorized quantities.

Navigate: Main Menu > Inventory Mgmt > Stock Count. The Stock Count List window opens.

To enter authorized quantities manually, follow these steps:

1. If you want to filter the Stock Count List, click **Filter**. See [“Filter the Stock Count List.”](#)
2. Double-click on the stock count for which you want to enter authorized quantities. The Child Stock Count List window opens.
3. Click **Authorize**. The Stock Count Authorization window opens.

Note: If there is only one child count for the master count, the items of the child count are listed. If there is more than one child count, you must select the child count you want (see Step 4).

For each item, the Stock Count Authorization window lists the following:

- The count quantity, count variance, and count variance percentage
 - The recount quantity, recount variance, and recount variance percentage (if there was a recount)
 - The SIM stock on hand quantity (SOH column)
4. If there is more than one child count, select the child count in the **Child Stock Count** section as follows:
 - a. If you want to clear the selection fields, click **Clear**.
 - b. In the **Status** field, select the status of the child count you want.
 - c. In the **Child** field, select the child count.
 - d. Click **Search**.
 5. To filter the items of the child count that are listed, use fields in the **Filter** section as follows:
 - a. In the **Item Filter** field, select Discrepant Items or All Items.
 - b. In the **Auth Qty** field, select Authorized, Unauthorized, or All Items.

You can change this filtering whenever you want.
 6. If you want to filter the item list further (for example, to find items that far exceed the allowed count variance), click the **Advanced Filter** button. See "[Filter the Stock Count Authorization List](#)."
 7. For each item for which you want to enter the authorized quantity manually, follow these steps:
 - a. Double-click in the **Authorized Qty** field to activate edit mode.
 - b. Enter the authorized quantity for the item.
 - c. Press **Enter** (or press Tab to go to the next item).
 8. When you are finished entering authorized quantities, do one of the following:
 - Click **Save Child** to save your entries. You can click this button as often as you want to save all entries you have completed so far. You remain in the Stock Count Authorization window, where you can continue updating authorized quantities for any of the child counts.
 - Click **Apply** to save your entries and return to the Child Stock Count List window.
 - If you want SIM to fill in the remaining blank authorized quantities, click **Update Auth Qty**. See "[Update Auth Qty Button – Stock Count Authorization Window](#)" for more information.
 - If you want SIM to confirm (permanently save) all authorized quantities, click **Confirm Child**. See "[Confirm Child Button – Stock Count Authorization Window](#)" for more information.

- If you want SIM to update a previous snapshot, click **Update Snapshot** to update the stock count with any late sales that were uploaded since entering the authorization stage.

Note: You can also confirm all child counts by clicking **Confirm Authorization** in the Child Stock Count List window. Clicking that button automatically updates the authorization quantities with the last counted quantities and confirms the master count.

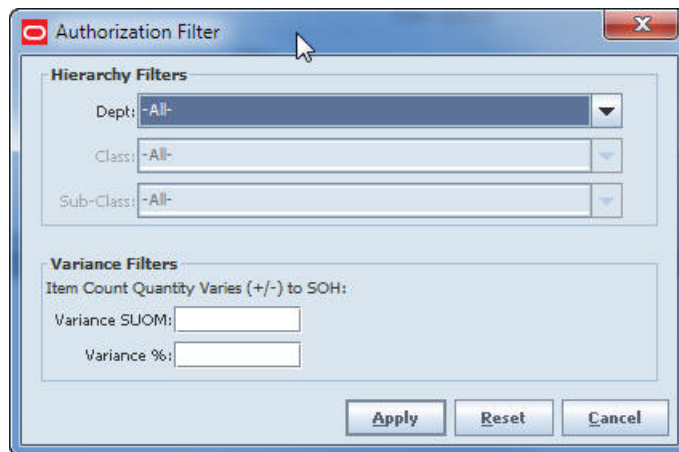
Filter the Stock Count Authorization List

You can apply additional filters to specify which items you want to list in the Stock Count Authorization window.

To filter the Stock Count Authorization list, follow these steps:

1. Click **Advanced Filter**. The Authorization Filter window opens.

Figure 14–12 Authorization Filter Window



2. Enter or select search values as needed to specify the child counts that you want to list. All values are optional. If you leave a field blank or select All, all values are included in the search.

Hierarchy – Select department, class, and subclass values as needed. The items displayed in the list will be those items in the stock count for the hierarchy that you select.

Variance Filters – These filters allow you to filter the list to only those item counts that are discrepant by a count or percentage equal to or greater than you specify. You can use either or both of these fields:

- **Variance SUOM** – Enter a count threshold value in the standard unit of measure for an item count to be discrepant. Counts that are discrepant by a count equal to or greater than this value, plus or minus, will be listed.
 - **Variance %** – Enter a count percentage threshold value for an item count to be discrepant. Counts that are discrepant by a percentage equal to or greater than this percentage, plus or minus, will be listed.
3. Click **Apply**. You return to the Stock Count Authorization window, where your filter has been applied.

Other Methods to Update Authorized Quantities

There are several methods to update authorized quantities, and optionally confirm authorized quantities, in one step. You can complete and confirm authorized quantities after you have entered some quantities manually, or you can complete authorized quantities without any manual entries. There are several ways to do this, using the following buttons in SIM windows:

- [Update Auth Qty Button – Stock Count Authorization Window](#)

With this method, all empty authorized quantities for the current child count are filled in with the last count or recount quantity. You still have the option to change values manually before confirming the count, and you can save or discard all changes to authorized quantities.

- [Update Auth Qty Button – Child Stock Count List Window](#)

With this method, all empty authorized quantities for the selected child counts are filled in with the last count or recount quantity. You still have the option to change values manually before confirming the count.

- [Confirm Child Button – Stock Count Authorization Window](#)

With this method, the child count moves to Authorize Completed status (Authorize Confirmed for a Unit and Amount count). No further changes can be made to authorized quantities in the confirmed child count.

- [Confirm Authorization Button – Child Stock Count List Window](#)

With this method, all empty authorized quantities for all child counts are filled in with the last counted quantities. The child counts and the master count move to Authorize Completed status (Authorize Confirmed for a Unit and Amount count). No further changes can be made to any authorized quantities in any child counts.

Caution: If you want to enter authorized quantities for certain items manually, enter these quantities before you click either the **Confirm Child** or **Confirm Authorization** button. Quantities that are confirmed cannot be changed.

SIM Rules for Blank Authorized Quantities

When SIM fills in blank authorized quantities, the following rules apply:

- The authorized quantity for an item is filled in with the last counted quantity. If a recount was done, the recount quantity is used.
- For Unit and Amount counts, if there is no count or recount quantity entered, the authorized quantity is 0 (zero). All authorized quantities must be filled in for a Unit and Amount count.
- For Unit, Problem Line, and Ad Hoc count types, if there is no count or recount quantity entered, the authorized quantity is blank (null) or zero, depending on your SIM system settings. These count types can include uncounted items.

See the *Oracle Retail Store Inventory Management Implementation Guide* for information about SIM system options that control rules for authorized stock count quantities.

Update Auth Qty Button – Stock Count Authorization Window

Use this method to have SIM fill in all empty authorized quantities for the current child count (in Authorize New or Authorize In Progress status). You can still update authorized quantities through manual entries before or after you select this action.

This action does not change any quantities that you entered previously, either through manual entries or by using this button.

Navigate: Main Menu > Inventory Mgmt > Stock Count. The Stock Count List window opens.

To update authorized quantities for one child count, follow these steps:

1. If you want to filter the Stock Count List, click **Filter**. See [“Filter the Stock Count List.”](#)
2. Double-click on the stock count for which you want to enter authorize quantities. The Child Stock Count List window opens.
3. Click **Authorize**. The Stock Count Authorization window opens.

Note: If there is only one child count for the master count, the items of the child count are listed. If there is more than one child count, you must select the child count you want (see Step 4).

4. If there is more than one child count, select the child count in the **Child Stock Count** section as follows:
 - a. If you want to clear the selection fields, click **Clear**.
 - b. In the **Status** field, select the status of the child count you want.
 - c. In the **Child** field, select the child count.
 - d. Click **Search**.
5. To filter the items of the child count that are listed, use fields in the **Filter** section as follows:
 - a. In the **Item Filter** field, select Discrepant Items or All Items.
 - b. In the **Auth Qty** field, select Authorized, Unauthorized, or All Items.

You can change this filtering whenever you want.

6. Click **Update Auth Qty**. This message is displayed: “All discrepant items without authorized quantities will be defaulted with the last counted quantity. Do you wish to continue?”

Note: For Unit and Amount counts, the message will say "all items." For other count types, the message might also say "all items," depending on your SIM system settings.

7. Click **Yes**.
8. Do one of the following:
 - Click **Save Child** to save the authorized quantity entries. You can click this button as often as you want to save all entries completed so far. You remain in the Stock Count Authorization window, where you can continue updating authorized quantities for any of the child counts.
 - Click **Back** to return to the Child Stock Count List window.
 - If you want SIM to confirm (permanently save) all authorized quantities, click **Confirm Child**. See [“Confirm Child Button – Stock Count Authorization Window”](#) for more information.

Update Auth Qty Button – Child Stock Count List Window

Use this method to have SIM fill in all empty authorized quantities for one or more of the child stock counts listed in the Child Stock Count List window (in Authorize New or Authorize In Progress status). You can still update authorized quantities through manual entries before or after you select this action, as long as the count has not yet been confirmed. This action does not change any quantities that you entered previously, either through manual entries or by using this button.

Navigate: Main Menu > Inventory Mgmt > Stock Count. The Stock Count List window opens.

To update authorized quantities for one child count, follow these steps:

1. If you want to filter the Stock Count List, click **Filter**. See "[Filter the Stock Count List](#)."
2. Double-click on the stock count for which you want SIM to complete the authorized quantities. The Child Stock Count List window opens.
3. Select the child counts for which you want SIM to update the authorized quantities.
4. Click **Update Auth Qty**. This message is displayed: "All discrepant items without authorized quantities will be defaulted with the last counted quantity. Do you wish to continue?"
5. Click **Yes**.

At this point, you can optionally view or edit the authorized quantities or confirm the child count; see "[Confirm Child Button – Stock Count Authorization Window](#)."

6. Click **Back** to return to the Stock Count List window.

Confirm Child Button – Stock Count Authorization Window

Use this method when you have completed all manual entries for authorized quantities. This action does not change any quantities that you entered previously, either through manual entries or by using the **Update Auth Qty** button

When you confirm a child count, quantities and status are affected as follows:

- **Ad Hoc, Unit and Problem Line** stock count types – Empty authorized quantities are left blank (null, not counted). The status of the child count changes to Authorize Completed.
- **Unit and Amount** stock count type – Authorized quantities cannot be blank. If any authorized quantities are blank, a message asks whether you want to use the last counted quantities. If you answer No, no action is taken. If you answer Yes, the last count or recount quantity is filled in for any blank authorized quantity, and the child count moves to Authorize Confirmed status.

No further changes can then be made to authorized quantities. SIM inventory adjustments are written for those items that have authorized quantities different from those of the snapshot of the stock on hand.

Navigate: Main Menu > Inventory Mgmt > Stock Count. The Stock Count List window opens.

To confirm a child count, follow these steps:

1. If you want to filter the Stock Count List, click **Filter**. See "[Filter the Stock Count List](#)."

2. Double-click on the stock count for which you want to confirm one or more child counts. The Child Stock Count List window opens.
3. Click **Authorize**. The Stock Count Authorization window opens.

Note: If there is only one child count for the master count, the items of the child count are listed. If there is more than one child count, you must select the child count you want (see Step 4).

4. If there is more than one child count, select the child count in the **Child Stock Count** section as follows:
 - a. If you want to clear the selection fields, click **Clear**.
 - b. In the **Status** field, select the status of the child count you want.
 - c. In the **Child** field, select the child count.
 - d. Click **Search**.
5. Click **Confirm Child**. A confirmation prompt is displayed.
6. Click **Yes** to confirm the child.
7. Click **Back** to return to the Child Stock Count List window.

Confirm Authorization Button – Child Stock Count List Window

Use this “blind” authorization method to complete all blank authorized quantities for all child counts and make the changes permanent. The child counts and the master count move to Authorize Completed status and stock on hand is updated. SIM inventory adjustments are also written for those items that have authorization quantities different from those of the snapshot of the stock on hand. No further changes can be made to any authorized quantities in any child counts.

Navigate: Main Menu > Inventory Mgmt > Stock Count. The Stock Count List window opens.

To fill in all authorized quantities and change all child counts to Authorize Completed, follow these steps:

1. If you want to filter the Stock Count List, click **Filter**. See [“Filter the Stock Count List.”](#)
2. Double-click on the stock count for which you want to complete the authorized quantities and confirm authorization. The Child Stock Count List window opens.
3. Click **Confirm Authorization**. A message is displayed: "All items with blank authorization quantities will be set to the last counted quantity. Would you like to continue?"
4. Click **Yes**. The status of the child count moves to Authorize Completed.

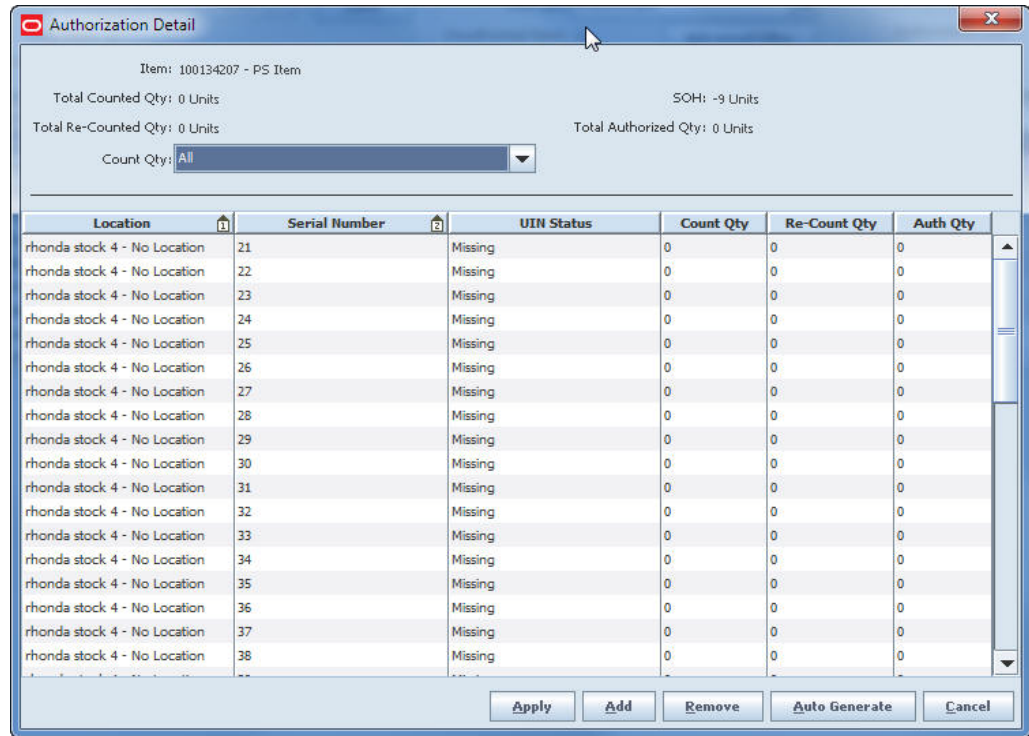
Update UINs before Authorizing

For items that require UINs, the values of the Authorized Qty and UIN Qty fields should be equal. You can add and delete UINs as needed before you authorize the count.

To update UINs for the child count, follow these steps:

1. In the Stock Count Authorization window, double-click on the item for which you want to update UINs. The Authorization Detail window opens.

Figure 14–13 Authorization Detail Window



By default, the Authorization Detail lists uncounted items. Use the **Filter** drop-down to select whether to list uncounted, counted, or all items.

Items are listed as follows:

- For items that do not require UINs, one row is listed per location.
- For items that require UINs, one row is listed per UIN/location combination. All UINs that were counted are listed, as well as all UINs that should have been counted (based on their status when the snapshot was taken), regardless of the current Filter selection.

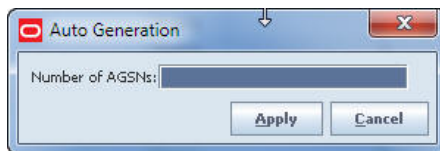
For each item, the following information is listed:

Column	Description
Location	For sequenced stock counts, the location name. For other stock counts, "No Location" is displayed.
Serial Number	Unique identification number of the item. For items that require Serial numbers, all serial numbers are listed, regardless of whether they were counted or recounted.
UIN Status	Status of the UIN (such as Missing, Reserved for Shipping).
Count Qty	Count quantity for the item in the location. For an item that requires UINs, this value is 1, 0, or null (not counted).
Re-Count Qty	Recount quantity for the item in the location. For an item that requires UINs, this value is 1, 0, or null (not recounted).

Column	Description
Auth Qty	<p>For an item that does not require UINs, this is the same as the Auth Qty from the Stock Count Authorization window.</p> <p>For an item that requires a UIN, the value of this field determines whether the UIN will be considered counted and confirmed. A value of 1 indicates that you want to authorize this UIN. A value of 0 indicates that you do not want to authorize this UIN for the count. A null value indicates the item was not counted or recounted.</p> <p>When a UIN item is authorized in a stock count, the UIN status is changed to In Stock if it has one of the following statuses: Missing, Sold, Customer Order Fulfilled, Shipped to Warehouse, Shipped to Vendor, Shipped to Finisher, Removed from Inventory.</p> <p>For the statuses Customer Order Reserved, Unavailable, or Reserved for Shipping, the status is not changed.</p>

2. To add a serial number type UIN, follow these steps:
 - a. Click **Add**.
 - b. Update the **Serial Number** and **Auth Qty** fields in the new row.
3. To generate UINs for an Auto-Generate SN (AGSN) type UIN, follow these steps:
 - a. Click **Auto Generate**. The Auto Generation window opens.

Figure 14–14 Auto Generation Window – Stock Counts



- b. In the **Number of AGSNs** field, enter the number of AGSNs you want to generate.
 - c. Click **Apply** to save and return you to the Authorization Detail window.
4. To delete a UIN, select the row and click **Remove**.
5. Click **Apply** to save your changes and return to the Stock Count Authorization window.

View and Update Rejected Items

Some counted items might be rejected when data is scanned or imported into SIM. You can view rejected items, if any, and assign valid SIM item IDs to items not on file and nonranged items. You can also update unique identification numbers (UIN) if they are required for some items in the count.

Reasons for Rejection

An item that does not require unique identification numbers (UIN) can be rejected for the following reasons:

- Item Not on File

Not on file items are items that are not found in the SIM enterprise-wide inventory. These items might not be set up in the merchandising system. Not on file items can be added to the count.

- **Item Not at Store**

Nonranged items are items that are in the SIM inventory, but they have not been ranged to the store. These items can also be added to the count.

- **Item Not on Count**

Not on count items are items that are not included in the stock count product group. These items cannot be added to the stock count, and they should not have been counted. You cannot take any action with these items.

Rejected Items That Require UINs

For items that require UINs, these statuses can apply:

- **UIN Duplicate**

The same UIN was counted twice for the same valid SIM item during the third-party count. SIM accepts the first item/UIN combination but rejects any duplicates.

- **UIN Required**

A valid SIM item was counted, but the UIN was not provided in the third-party data file. You can assign a valid SIM item ID and UIN.

- **UIN Not on Count**

A UIN was scanned, but the item/UIN combination does not exist in the product group element selected for the count. You cannot take any action with these items. (You can view the UINs that were counted.)

- **UIN Not at Store**

The item/UIN combination exists at a different store. Depending on your SIM system configuration, you may be able to reassign this item/UIN combination to your store. If your SIM configuration does not allow reassignment, you cannot take any action with these items.

- **UIN Not on File**

The item is not on file in SIM. You can assign the item a valid SIM item ID, but you must also enter a UIN for the item.

- **AGSN Required**

If Auto-Generated SN type UINs are required for the item, but the counted items do not have AGSNs assigned in the third-party data file, the items are rejected. You must generate the AGSNs; see [“Update UINs before Authorizing.”](#)

View and Update Rejected Items

You can update rejected items to add item IDs and UINs as required.

Navigate: Main Menu > Inventory Mgmt > Stock Count. The Stock Count List window opens.

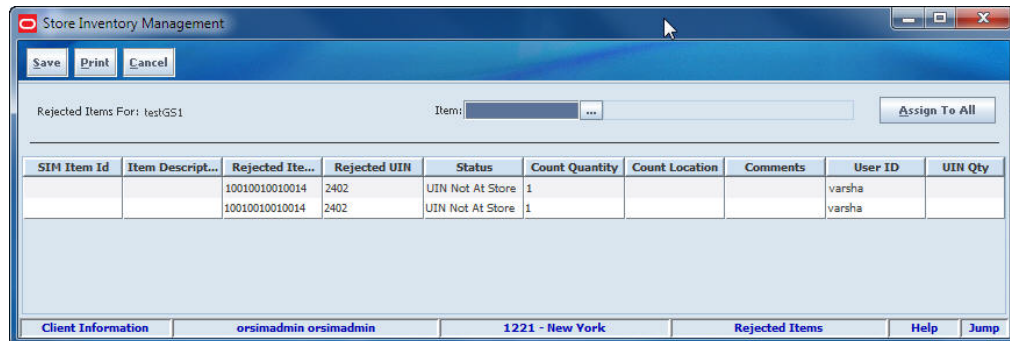
To view and update rejected items, follow these steps:

1. If you want to filter the Stock Count List, click **Filter**. See [“Filter the Stock Count List.”](#)

2. Double-click on the stock count for which you want to view the rejected items. The Child Stock Count List window opens.
3. Click **Rejected Items**. The Rejected Items window opens.

Note: If there are no rejected items for the count, a message is displayed to inform you that there are no rejected items. In that case, the Rejected Items window does not open, and the remaining steps of this procedure do not apply.

Figure 14–15 Rejected Items Window



You can add items to the count if the Status value is either Item Not At Store or Item Not On File. You can enter item IDs for individual items, or you can assign one item ID to all items that do not yet have item IDs in the SIM Item ID column.

You can also correct problems with UINs for rejected items that have the following statuses:

- UIN Duplicate
- UIN Required
- UIN Not at Store
- UIN Not on File

Note: For items that require AGSNs, you can generate the required AGSNs from the Authorization Detail window. See [“Update UINs before Authorizing.”](#)

4. To add a SIM Item ID to a single item, follow these steps:
 - a. Select the rejected item you want to look up.
 - b. In the Item field, click the **Ellipsis** button to look up the item.
 In the Item Lookup window, enter search criteria as needed to find the item you want. (See [“Item Lookup”](#) in [Chapter 20](#) for more information about item lookup criteria.) Select the item and click **Apply** to return to the Rejected Items window.
5. To assign the same SIM Item ID to all items on the rejected list that do not yet have SIM Item ID values, follow these steps:
 - a. In the Item field, click the **Ellipsis** button to look up a valid item.

In the Item Lookup window, enter search criteria as needed to find the item you want. Select the item and click **Apply** to return to the Rejected Items window.

- b. Click **Assign to All**.

Note: The selected Item ID is assigned to all rejected items that do not yet have a valid SIM Item ID value. Items for which you have already assigned item IDs are not changed. Be sure that the item ID you assign with the Assign to All button is correct for all items to which it is assigned. If necessary, fix errors by assigning different IDs to individual items (see Step 4).

6. To correct problems with duplicate or missing UINs, follow these steps:

Note: An item must have a valid SIM Item ID before you can assign it a unique identification number.

- a. Double-click the item. The UIN window opens.
 - b. Enter the correct UIN for the item.
 - c. Click **Apply** to save your changes and return to the Rejected Items window.
7. For items with status UIN Not on File, follow these steps:

Note: Items with UIN Not on File status can be assigned to your store only if your SIM system configuration allows it.

- a. Double-click the item. You receive a prompt asking whether you want to assign the UIN to your store.
 - b. Click **OK** to assign this UIN to your store.
8. Click **Save** to save your changes and return to the Child Stock Count List window.
 9. Click **Back** to return to the Stock Count List window.

Delete Stock Counts

You cannot delete stock counts if there are any child counts in Authorize Completed status. You can only delete ad hoc stock counts if they are in Authorize New or Authorize In Progress status. See "[Stock Count Status](#)" for more information.

Navigate: Main Menu > Inventory Mgmt > Stock Counts. The Stock Count List window opens.

To delete stock counts, follow these steps:

1. If you want to filter the stock counts listed, click **Filter**. See "[Filter the Stock Count List](#)."
2. Select the stock counts that you want to delete.
3. Click **Delete**. A message is displayed: "Are you sure you want to delete the selected stock counts now?"

Note: If you have selected any stock count that cannot be deleted, you receive an error message and that count is not deleted.

4. Click **Yes**. The stock counts are deleted.

Stock Count Status

From start to completion, each stock count proceeds through different stages and statuses. In each of these stages, you can perform certain actions with the stock count.

Stages and Statuses

The stages of a stock count are as follows:

- Future Stock Count
- Stock Count
- Re-count
- Authorize

Each stock count stage (displayed as Type) for the master count has statuses and rules as described in the following.

Future Stock Count

These stock counts have no status. When the scheduled date is reached, SIM extracts the count again. The stock count then moves to the Stock Count List window, and its status changes to Stock Count New.

Stock Count New

All stock counts extracted on the scheduled date begin as Stock Count New. If Daily Sales Processing is being used, you can select whether the count is being performed before or after store hours.

Note: The before or after store hours setting cannot be changed after the count has moved to In Progress, when the count process has started or the snapshot has been taken.

For a count in Stock Count New status, you can take the snapshot, enter count quantities, save the count, or print a report.

Note: For Unit and Problem Line counts, you cannot enter count quantities until the snapshot has been taken. When you are using Third-party counting method, the snapshot must be taken before the stock count data is uploaded to SIM.

Stock Count In Progress

A stock count moves to Stock Count In Progress after you start the counting process or take the snapshot. You can perform an initial count of the items listed in the stock count. This initial count can be completed immediately, or saved and completed later.

Re-count New

The stock count moves to Re-count New after the initial count has been completed but discrepant item counts exist.

Note: A recount occurs only if the product group requires recounting of discrepant items.

There is no recount process for ad hoc stock counts or third-party stock counts.

Re-Count In Progress

A stock recount moves to Re-count In Progress after you start the counting process or take the snapshot.

Note: A snapshot cannot be taken on the recount for Unit and Amount counts.

You can perform a recount that occurs after the initial count. This recount can be completed immediately, or saved and completed later.

Authorize New

The stock count moves to Authorize New after the count process and recount process, if required, are completed. The stock count is typically confirmed by a manager who confirms the count and recount quantities. In confirming the count, there is an option to automatically fill all authorized quantities with the last count quantity.

For third-party stock counts, if you do not use the auto-authorize process, you can assign not-on-file items to valid SIM item IDs before you confirm the count.

Authorize In Progress

The stock count moves to Authorize In Progress after a single child count authorized quantity has been saved or confirmed.

Authorize Completed

The stock count moves to Authorize Completed after all child counts have been confirmed.

After the stock count moves to Authorize Completed, you can only view the stock count, and you cannot change any quantities.

Actions That Change Stock Count Type and Status

The following tables summarize the actions that move a stock count to a particular stage (Type) and status.

Note: A status does not apply to future stock counts. Future stock counts can be viewed before their scheduled dates, but you can take no action with them.

Master Stock Counts

Master stock counts are counts that are split into one or more child counts. The status of the master count depends on the statuses of the child counts. The status cannot

change until the status of each child count has changed. The status changes from New to In Progress, however, when a single child stock count moves to In Progress, or when the snapshot is taken.

Action	Stock Count Stage (Type)	Stock Count Status
Future count extracted before the scheduled date	Future Stock Count	N/A
New count extracted on the scheduled date	Stock Count	New
Snapshot taken of one or more child counts	Stock Count	In Progress
Count completed for a single child count, and at least one child is not completed yet	Stock Count	In Progress
Count completed for all children	Re-Count (If a recount is required, otherwise Authorize)	New
Recount completed for a single child count, and at least one child count is not completed	Re-Count	In Progress
Recount completed for all child counts	Authorize	New
Authorization completed for a single child count, and at least one child is not authorized	Authorize	In Progress
All child counts completed for the stock count (Unit, Problem Line)	Authorize	Completed

Child Stock Counts

Child stock counts are counts that belong to a master stock count. A large stock count might have many child counts, but a smaller count might have only one child count. You can perform actions on each of the child counts separately. Until all child counts change status, the status of the master count does not change.

Notes:

- A child count is in Pending status in these cases:
 - For Unit and Amount counts (guided and unguided), the child stock count quantities have been entered and the count has been completed, but the snapshot has not been taken.
 - For guided counts (Unit, Problem Line, Unit and Amount), the child stock count has been completed but there is at least one item that has not been counted in all its locations. After the item has been counted in all locations, the count is ready for authorization.
 - A status does not apply to future stock counts. Future stock counts can be viewed before their scheduled dates, but you can take no action with them.
-
-

Action	Stock Count Stage (Type)	Stock Count Status
Future count extracted before the scheduled date	Future Stock Count	N/A
New count extracted on the scheduled date	Stock Count	New
Snapshot not taken but count started and Complete button clicked (Unit and Amount only, both guided and unguided)	Stock Count	Pending
At least one item not counted in all locations (Unit, Problem Line, Unit and Amount guided counts only)	Stock Count	Pending
Snapshot taken of child count but count not completed	Stock Count	In Progress
Count completed for child and snapshot taken	Re-Count (If a recount is required, otherwise Authorize)	New
Recount started and saved	Re-Count	In Progress
Recount completed	Authorize	New
Child count authorized	Authorize	Completed

Shelf Replenishment

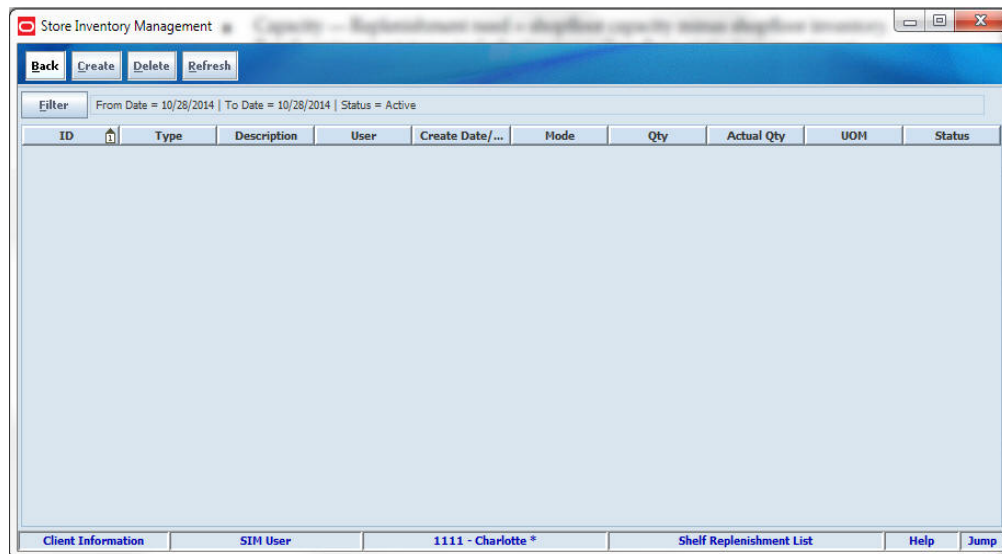
You can use Shelf Replenishment to create lists in a variety of ways to efficiently replenish stock. This can be used in conjunction with sequencing to determine the shelf capacity, but is not required for all shelf replenishment types. Some lists may be configured to generate a list within day or at the end of the day to assist with determining the appropriate fill level.

There are four shelf replenishment types:

- **Adhoc** — Replenishment need = handheld scanned units. Retail environment types include unstructured or unique shop floor format, easy to identify missing items, continuous manual inventory checking, no need to track backroom or shopfloor inventory, grocery store or mass merchant.
- **Capacity** — Replenishment need = shopfloor capacity minus shopfloor inventory. Retail environment types include structured shop floor, static item assortment, multiple units per item on shopfloor, grocery store or mass merchant.
- **Display** — Replenishment need = single style/diff item not scanned based on analysis of a product group. Retail environment types include unstructured or unique shop floor format, difficult to identify missing display items, display of single style/color item is very important, very large number of unique items in backroom, accessory fashion retailer.
- **Sales** — Replenishment need = sold units. Retail environment types include unstructured or unique shop floor, dynamic or short lived item cycle, low unit count per item on shop floor, many unique items, or high-end fashion retailer.

Shelf Replenishment Window

Navigate: Main Menu > Inventory Mgmt > Shelf Replenishment. The Shelf Replenishment List window opens.

Figure 15–1 Shelf Replenishment List Window

From the Shelf Replenishment List window, you can do the following:

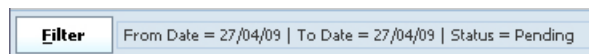
- [Filter the Shelf Replenishment List](#)
- [Create a Shelf Replenishment List](#)
- [Enter Shelf Replenishment List Quantities](#)
- [Print a Shelf Replenishment List Report](#)
- [Delete a Pending Shelf Replenishment List](#)

From the Shelf Replenishment List window, click **Back** to return to the Inventory Management menu.

Filter the Shelf Replenishment List

At any time while the Shelf Replenishment List window is open, you can click **Filter** to change how the list is filtered.

Current filtering is displayed next to the Filter button. If no filtering is displayed, all pick lists are currently selected and listed.



To change how the list is filtered, follow these steps:

1. Click **Filter**. The Shelf Replenishment List Filter window opens.

Figure 15–2 Shelf Replenishment List Filter Window

2. If you want to reset all filtering criteria to default values, click **Reset**.
3. Enter or select filtering criteria as needed to select just the shelf replenishment lists you want to list. All criteria are optional. If you leave a field blank or select All, all values will be included in your filtering selection.

Date Filters – Enter or select dates to select only those shelf replenishment lists created between a From Date and To Date that you specify. The default values for the dates are the current date. If you do not want to search on the created date, clear these fields.

Hierarchy Filters – Select Department, Class, and Sub-Class to select only those items for a hierarchy that you specify.

Shelf Replenishment List ID – Enter the system-generated numeric identifier of the shelf replenishment list you want.

Product Group – Select a product group to list only the shelf replenishment lists for that product group.

Shelf Adjustment List — Select a Shelf Adjustment list from the drop-down list.

Item – Enter the item number or click the **Ellipsis** button to look up the Item ID.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Shelf Replenishment List Filter window. See “[Item Lookup](#)” in [Chapter 20](#) for more information.

Status – Select All, Active (default), Canceled, Completed, In Progress, New, Pending, or Altered from the drop-down list.

Mode – Select All (default), End of Day, or Within Day shelf replenishment.

User – Select a user from the drop-down list.

4. Click **Apply**. Results that match your search criteria are displayed in the Shelf Replenishment List window.

Create a Shelf Replenishment List

Use this function to create a shelf replenishment list. After you create the shelf replenishment list, SIM automatically generates the pick list based on SIM settings for shelf replenishment.

Navigate: Main Menu > Inventory Mgmt > Shelf Replenishment. The Shelf Replenishment List window opens.

To create a new shelf replenishment list, follow these steps:

1. Click **Create**. The Shelf Replenishment List Create window opens.

Figure 15–3 Shelf Replenishment List Create Window

2. Enter or select values for these fields:

Shelf Replenishment Type – From the drop-down list, select Adhoc, Capacity, Display, or Sales.

Mode – From the drop down list, select the mode for which you want to create a shelf replenishment, end of day or within day. For a within-day shelf replenishment list, SIM generates a shelf replenishment list with the number of cases that you have time to complete. For an end-of-day shelf replenishment list, SIM generates a shelf replenishment list for all items that need replenishing. This field is disabled for replenishment type of Ad Hoc or Display.

Amount to Replenish – Enter the number of cases/units to be replenished, based on the amount of labor available.

Note: This field is enabled only if the mode is Within Day. If the mode is End of Day, the amount is disabled.

Product Group – From the drop-down list, select the product group for which you want to create a shelf replenishment list. This field is disabled when the Shelf Replenishment Type is Ad Hoc. When a Hierarchy Filter is selected for Replenishment Type Sales, this field is disabled.

3. **Check Available Items** – Select to check whether the items with quantity 0 or less would be considered for the list. This field is automatically checked and disabled for Display type.
4. **Hierarchy Filters** – Select Department, Class, and Sub-Class to select only those items for a hierarchy that you specify. This field is only available for Replenishment Type of Sales. If the user has selected a product group, this field is disabled.
5. **Shelf Adjustment List** – Select shelf adjustment list for Adhoc and Display list replenishment.
6. Click **Save**. A message is displayed: “Are you sure you want to create the shelf replenishment list?”
7. Click **Yes** to create the shelf replenishment list and return to the Shelf Replenishment List window.

Shelf Replenishment List Processing

After you click **Save**, the replenishment calculation runs and SIM performs the following actions:

- **Adoc** — Handheld is required to create a shelf adjustment list prior to creating the Shelf Replenishment List. Goods are moved only if more than the available quantity.
- **Capacity** — Gross need units is the total capacity minus the shop floor quantity. The net need calculation uses the total capacity, max fill percentage and mode. The fill quantity is the net need or the total available, whichever is smaller.
- **Display** — During high sales cycles, available stock is not displayed on the shop floor. Handheld is required to create a display list by scanning the available goods.
- **Sales** — Sales are reset at the end of the day and items sold from the backroom will show up on the replenishment list. New assortments must be replenished before the store opens.

Enter Shelf Replenishment List Quantities

Use this function to update the actual quantities replenished.

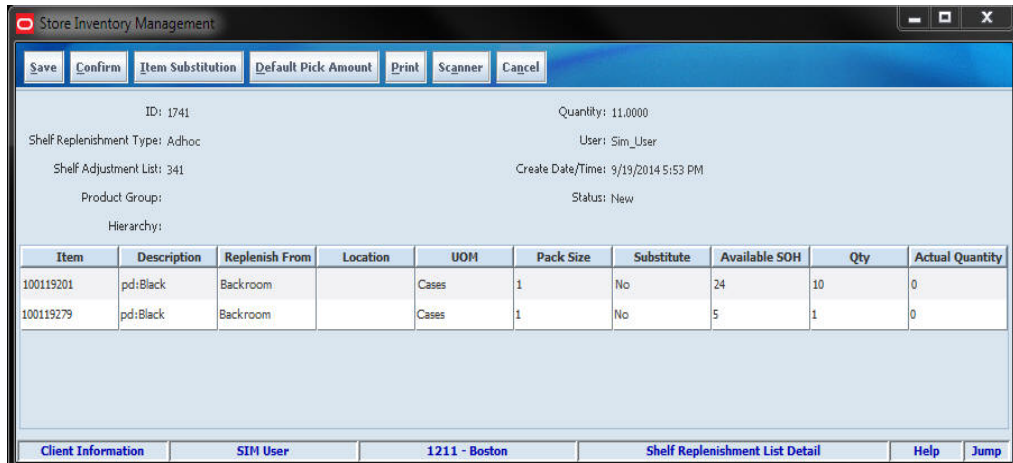
Note: You can edit quantities only when the shelf replenishment list status is Completed or In Progress.

Navigate: Main Menu > Inventory Mgmt > Shelf Replenishment. The Shelf Replenishment List window opens.

To enter shelf replenishment list quantities, follow these steps:

1. Double-click the shelf replenishment list for which you want to enter quantities. The Shelf Replenishment List Detail window opens.

Figure 15–4 Shelf Replenishment List Detail Window



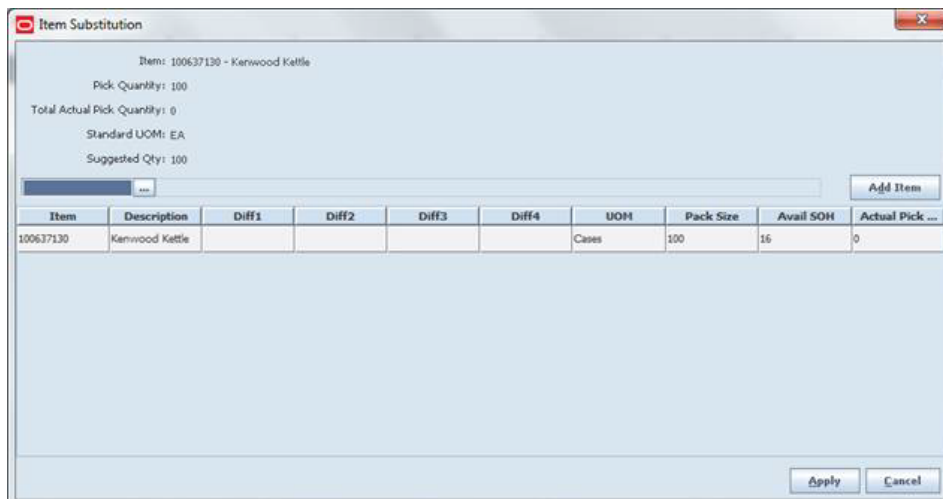
2. Select **Default Pick Amount** to update the Actual Quantity field based on a suggested pick amount. This field is only defaulted if there is not a previous quantity in the field.
3. In the **Actual Quantity** field, enter the number of items that you replenished.
4. Click **Save** to return to the Shelf Replenishment List window.
5. Click **Confirm** to complete the shelf replenishment and return to the Shelf Replenishment List window.
6. Click **Default Pick Amount** to default the suggested pick amount into the Actual Quantity field if the amount is null.

Substitute an Item for Shelf Replenishment

If an item exists on the shelf replenishment, but no inventory can be found, if check available items is selected, an item can be substituted for a shelf replenishment.

1. Click **Item Substitution**. The Item Substitution popup window opens. All items listed fall under the same type as the item that is on the shelf replenishment.

Figure 15–5 Item Substitution Window



2. If Item Lookup is available, search for an item to select and then click **Add Item** to add the item to the pick.
3. Enter the substitution, such as UOM or quantities.
4. Click **Apply** to add the item to the Shelf Replenishment Detail window with default the actual quantity to 1.

Print a Shelf Replenishment List Report

You can print a shelf replenishment list report to print a generated shelf replenishment list. You can use the report as a reference for the actual replenishing of items.

Note: When you print a pending shelf replenishment list, the system changes the status to Complete and updates inventory.

Navigate: Main Menu > Inventory Mgmt > Shelf Replenishment. The Shelf Replenishment List window opens.

To print a shelf replenishment list report, follow these steps:

1. Double-click the shelf replenishment list that you want to print. The Shelf Replenishment List Detail window opens.
2. Click **Print**. A message is displayed: "Are you sure you want to print the shelf replenishment lists?"
3. Click **Yes**. The Report Selection window opens.
4. In the **Printer** field, select the output device for the report.
5. Click **OK**. A message is displayed: "Shelf Replenishment printed." You are turned to the Shelf Replenishment List Detail window.
6. Click **OK**.
7. Click **Save** to return to the Shelf Replenishment List window.

Delete a Pending Shelf Replenishment List

Note: You can delete a Shelf Replenishment List only if its status is Pending.

Navigate: Main Menu > Inventory Mgmt > Shelf Replenishment. The Shelf Replenishment List window opens.

To delete shelf replenishment lists, follow these steps:

1. Select the shelf replenishment lists that you want to delete.
2. Click **Delete**. A message is displayed: "Are you sure you want to delete the selected shelf replenishment lists now?"
3. Click **Yes**. The selected shelf replenishment lists are deleted.

Item Requests

Use the Item Request functions to request items to cover shortages and increased demand. For some items, store ordering may be allowed (see [Chapter 19, "Store Orders"](#)), but you can use item requests to replenish any items. Item requests are sent to the merchandising system, and the item is sourced from a warehouse or supplier depending on parameters set up for that item.

Item Request List Window

Navigate: Main Menu > Inventory Mgmt > Item Request. The Item Request List window opens.

Figure 16–1 Item Request List Window

Request ID	Request Deliver...	Dept	Request Descrip...	Exp Date	Status	Lines	User
1462	11/15/13	9898			Pending	1	orsimadmin
1561		6	test test		Pending	1	Auto Create
1563		111	ragav test		Pending	1	Auto Create
1565	7/14/13	111	ragav test	7/9/13	Pending	55	Auto Create
1641	7/16/13	111			Pending	1	orsimadmin
1661		111	my item request		Pending	1	Auto Create
1681		6	afsf		Pending	1	Auto Create

From the Item Request List window, you can do the following:

- [Filter the Item Request List](#)
- [Request an Item](#)
- [Edit an Item Request](#)
- [Delete Item Requests](#)

From the Item Request List window, click **Back** to return to the Inventory Management menu.

Filter the Item Request List

Whenever the Item Request List window is displayed, you can filter the list of item requests to limit the requests listed. If the list is currently filtered, the filtering is shown next to the Filter button.



To filter the list of item requests or to change the current filtering, follow these steps:

1. In the Item Request List window, click **Filter**. The Item Request Filter window opens.

Figure 16–2 Item Request Filter Window

2. Enter or select search values as needed to specify the item requests that you want to list. All values are optional. If you leave a field blank or select All, all values are included in the search.

Date Filters – Enter or select From Date and To Date values to limit the date range.

Request ID – Enter the Request ID.

Item – Enter the Item ID or click the **Ellipsis** button to look up an item.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Item Request Filter window. See “[Item Lookup](#)” in [Chapter 20](#) for more information.

Delivery Timeslot – Select the delivery timeslot for the item requests.

Status – Select Canceled, Completed, Pending, or All. The default is Pending.

User – Select the user who made the requests.

3. Click **Search**. You return to the Item Request List window, where your filter has been applied.

Request an Item

Use this procedure to replenish any item.

Navigate: Main Menu > Inventory Mgmt > Item Request. The Item Request List window opens.

Note: SIM system options can limit the number of items that can be requested in a item request. If you have reached the maximum number of line items, you will receive a message that you cannot add any more items. You can continue, but you cannot add another item without first deleting one.

To request an item, follow these steps:

1. Click **Create**. The Item Request Detail window opens.

Figure 16–3 Item Request Detail Window – New Request

2. In the **Request Delivery Date** field, enter the date that you want the item delivered to your location, or click the **Calendar** button to select the date from the calendar. The date can be today or any later date.
3. In the **Comments** field, enter any additional information that you want to include with the request.
4. If you want to request a delivery time slot, and if the **Request Timeslot Delivery** field is enabled, select a time slot. (This field may not be available, depending on the item and how your system is set up. It is an optional field.)
5. Enter item information:
 - a. In the **Item** field, enter the item number click the **Ellipsis** button to look up the item, or click **Scanner** to scan the item. See “[Scan an Item \(Scanner Button\)](#)” in [Chapter 2](#) for more information.

In the Item Lookup window, enter search criteria as needed to find the item you want. (See “[Item Lookup](#)” in [Chapter 20](#) for more information about item lookup criteria.) Select the item you want and click **Apply** to return to the Item Request Detail window.
 - b. For each item on the request, enter information in the fields:
UOM – From the drop-down list, select the unit of measure.
Qty – Enter the number of items that you want delivered to your location.
 - c. To add more items to the item request, click **Add Item**.
 - d. Repeat Steps a through c for each item that you want to add.

6. Save or complete the request:
 - To save the request so you can modify it later, click **Save**. You are returned to the Item Request List window where the request displays with a status of Pending.
 - To complete the request, click **Request**. You are returned to the Item Request List window where the request is displayed with a status of Requested, if the filter is set to display requests in Complete status.

Edit an Item Request

Use this procedure to view or edit an item request. You can edit only item requests in Pending status.

Navigate: Main Menu > Inventory Mgmt > Item Request. The Item Request List window opens.

To locate and edit an item request, follow these steps:

1. If you want to filter the item requests listed, click **Filter**. See “[Filter the Item Request List](#).”
2. Double-click the item request you want to view or edit. The Item Request Detail window opens.

Figure 16–4 Item Request Detail Window – Edit

Item	Item Description	Available SDH	In Transit	UOM	Pack Size	Qty	Request Timeslot
100017603	PS Item	36	-12	Units	1		
100019906	PS Item	-3	-6	Units	1		
100027705	New Test Item	-208	-5	Units	1		

3. If you want to edit the item request, perform one or more of the following actions.

Change the Delivery Date

Enter a date in the Request Delivery Date field, or click the **Calendar** button to use the calendar to enter the date. The date can be today or any later date.

Remove an Item

- a. Select the line item that you want to remove.
- b. Click **Remove Item**.

Add an Item

- a. Click **Add Item**.
 - b. In the Item field, enter the item number or click the **Ellipsis** button to look up the item, or click **Scanner** to scan the item. See “[Scan an Item \(Scanner Button\)](#)” in [Chapter 2](#) for more information.
 - c. For each item, enter information in the fields.
 - UOM** – From the drop-down list, select the unit of measure.
 - Qty** – Enter the number of items that you want delivered to your location.
4. Save or complete the request:
 - To save the request so that you can modify it later, click **Save**. You return to the Item Request List window, where the request is displayed with a status of Pending.
 - To complete the request, click **Request**. You return to the Item Request List window, where the request is displayed with a status of Complete.

Delete Item Requests

Use this procedure to delete pending item requests. You can delete an item request only if its status is Pending.

Navigate: Main Menu > Inventory Mgmt > Item Request. The Item Request List window opens.

To delete item requests, follow these steps:

1. If you want to filter the item requests listed, click **Filter**. See “[Filter the Item Request List](#).”
2. Select the item requests that you want to delete.
3. Click **Remove Item**. A message is displayed: “Are you sure you want to delete the selected orders now?”
4. Click **Yes**. The requests are removed from the list.

Price Changes

Using the Price Change functions, you can request price changes for items at your store. Price changes are set in the pricing system. The pricing system might be Oracle Retail Price Management (RPM) or another application.

You can request price changes only for items for which you can control prices. This is controlled by an indicator at the store (location) level. Your price change requests are submitted to the pricing system, where they may be approved or rejected. After a price change is approved in the pricing system, a price change event is sent from the pricing system to SIM.

A price change request that is approved in the pricing system creates a pricing event that is sent back to SIM. For an approved price change, you can print labels and tickets for the re-priced items.

Price Change List Window

Navigate: Main Menu > Inventory Mgmt > Price Change. The Price Change Filter window opens.

Enter search criteria to limit the price change requests that you want displayed, and click **Apply**. (See “[Filter the Price Change List](#)” for more information.)

The Price Change List window opens.

Figure 17–1 Price Change List Window

Effective D...	End Date	Item	Description	Current Price	Current Sell	New Price	Item Selling ...	Multi Unit Pr...	Multi Unit U...	Multi Unit Pr...	Status	Promotion ID	Price Chang...
Jun 6, 2011 12...		100144107	Gain - Fresh S...	\$84.00	EA	\$84.00	EA			No	Completed		Permanent
Jun 6, 2011 4:3...		19753	Barcode L	USD00.00	EA	USD00.00	EA			No	Completed		Permanent
Jun 6, 2011 4:3...		100144807	leaf	USD100.00	EA	USD100.00	EA			No	Completed		Permanent
Jun 6, 2011 4:3...		100137240	Item1:Tobacco...	USD100.00	EA	USD100.00	EA			No	Completed		Permanent
Jun 6, 2011 4:3...		100136589	Item1:Green-G...	USD100.00	EA	USD100.00	EA			No	Completed		Permanent
Jun 6, 2011 4:3...		100136621	Item1:Green-R...	USD100.00	EA	USD100.00	EA			No	Completed		Permanent
Jun 6, 2011 4:3...		100136669	Item1:Navy-Ba...	USD100.00	EA	USD100.00	EA			No	Completed		Permanent
Jun 6, 2011 4:3...		100136905	Item1:Red-Goo...	USD100.00	EA	USD100.00	EA			No	Completed		Permanent
Jun 6, 2011 4:3...		100206007	07052011 Regu...	USD00.00	EA	USD100.00	EA			No	Completed		Permanent
Jun 6, 2011 4:3...		100136009	Item1:Proven-R...	USD100.00	EA	USD100.00	EA			No	Completed		Permanent

From the Price Change List window, you can do the following:

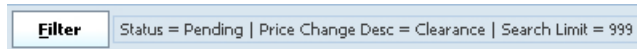
- [Filter the Price Change List](#)
- [Create a Price Change Request](#)
- [Edit a Price Change](#)

From the Price Change List window, click **Back** to return to the Inventory Management menu.

Filter the Price Change List

The Price Change Filter window opens each time you click Price Change on the Inventory Management menu. At any time while the Price Change List window is open, you can also change how the list is filtered.

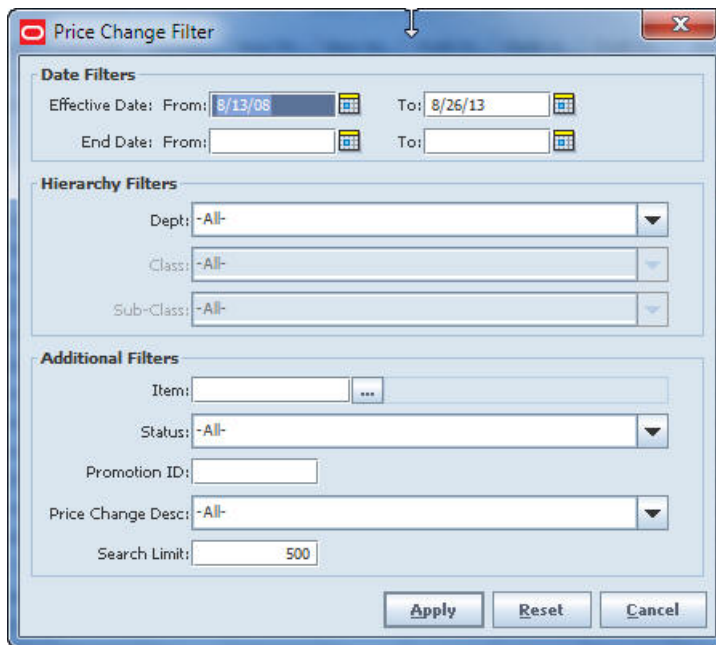
Current filtering is displayed next to the Filter button on the Price Change List window. If no filtering is displayed, all items are currently selected and listed.



To filter the price changes listed in the Price Change List window, follow these steps:

1. From the Price Change List window, click **Filter**. The Price Change Filter window opens.

Figure 17–2 Price Change Filter Window



2. If you want to reset all filtering criteria to default values, click **Reset**.
3. Enter or select filtering criteria as needed to select just the price changes you want to list. All criteria are optional. If you leave a field blank or select All, all values will be included in your filtering selection.

Date Filters – Enter or select dates to select only those price changes that have an Effective Date or End Date within a range that you specify.

Hierarchy Filters – Select Department, Class, and Sub-Class to select only those tickets for a hierarchy that you specify.

Item – Enter or select an item ID to select only those tickets for a particular item.

Status – Select Active, Completed, Pending, Ticket List, or All. The default value is Active.

Promotion ID – Enter a promotion ID to select only the tickets for which a promotion ID has been specified.

Price Change Desc – Select Clearance, Permanent, Promotional, or All.

4. In the **Search Limit** field, enter the maximum number of records you want to find and list. The default value is 999.
5. Click **Apply**. The price changes you have specified are listed in the Price Change List window.

Create a Price Change Request

You can request price changes for those items for which you are allowed to make pricing changes at the store (location) level. For these items, you can request changes to retail, promotion, or clearance pricing.

The request is sent to the pricing system, where it may be approved or rejected. Your price change requests are checked for possible conflicts. You cannot request price changes for items involved in complex promotions (such as buy one, get one free). You cannot request multiple price changes on the same day. Your request may be rejected if it conflicts with any other pricing events.

Navigate: Main Menu > Inventory Mgmt > Price Change. The Price Change Filter window opens.

Enter search criteria to limit the price change requests that you want displayed, and click **Apply**. (See [“Filter the Price Change List”](#) for more information.)

The Price Change List window opens.

To create a price change request, follow these steps:

1. Click **Create**. The Price Change Detail window opens.

Figure 17–3 Price Change Detail Window

The screenshot shows the 'Price Change Detail' window in the 'Store Inventory Management' application. The window title is 'Store Inventory Management' and it has standard Windows window controls (minimize, maximize, close). A 'Back' button is located in the top left corner. The main content area is divided into several sections:

- Item:** Store: 1211 - Boston; Item: 100114486 (with a dropdown arrow and '100114486 - pi' visible); Promotion ID: (empty); Status: Completed; Price Change Type: Clearance (with a dropdown arrow).
- Date:** Start Date: 4/30/2014 (with a calendar icon); End Date: 5/15/2014 (with a calendar icon).
- Price:** Current Price: \$125.00; MSRP: (empty); Selling UOM: EA; New Price: \$115.00 (with a text input field); Multi Unit Price Change: ; Multi Unit Price: (empty); Multi Unit Quantity: (empty); Multi Unit UOM: (empty).

At the bottom of the window, there is a navigation bar with the following buttons: Client Information, SIM User, 1211 - Boston, Price Change Detail (highlighted), Help, and Jump.

2. Enter or select values for these fields:

Item – Enter the item number or click the **Ellipsis** button to look up the item.

Price Change Type – Select Clearance, Promotional, or Permanent.

3. Enter or select the **Start Date**. (A default date is filled in.)
4. If you are entering a clearance or promotional price, enter or select an **End Date**.
5. Enter the new price for the item in the **New Price** field.

Note: The Price On Effective Date and UOM On Effective Date take into account already-scheduled price and UOM changes. Check these dates to verify that you are not duplicating or altering a price change.

6. Click **Save**.

You receive the following message: “Are you sure you want to request this price change?”

7. Click **Yes**. You return to the Price Change List window, where the price change is added with a status of Pending.
8. To create item tickets, follow these steps:
 - a. Select the items for which you want to create item tickets.
 - b. Click **Item Tickets**. A message is displayed: “Are you sure you want to create item tickets for the selected items?”
 - c. Click **Yes**.
9. To create shelf labels, follow these steps:
 - a. Select the items for which you want to create shelf labels.
 - b. Click **Shelf Labels**. A message is displayed: “Are you sure you want to create shelf labels for the selected items?”
 - c. Click **Yes**.

Edit a Price Change

You can edit price changes to change dates and prices.

Navigate: Main Menu > Inventory Mgmt > Price Change. The Price Change Filter window opens.

Enter search criteria to limit the price change requests that you want displayed, and click **Apply**. (See “[Filter the Price Change List](#)” for more information.)

The Price Change List window opens.

To edit a price change, follow these steps:

1. Double-click on the price change you want to edit. The Price Change Detail window opens.
2. Make changes as necessary to Start Date, End Date, and New Price fields.
3. Click **Save** to return to the Price Change List window.

Item Tickets

Use the Ticketing functions to print shelf edge labels and item tickets for stock at the store. You can print tickets or labels for individual items as well as print groupings of item tickets within ticket batches. SIM will automatically generate tickets and labels when price changes, description changes or QR changes are made.

Item Ticket List Window

Navigate: Main Menu >Print > Item Ticket. The Item Ticket Filter window opens.

Enter search criteria to limit the item tickets you want displayed, and click **Apply**. (See “[Filter the Item Ticket List](#)” for more information.) The Item Ticket List window opens.

Figure 18–1 Item Ticket List Window

Item	Description	Batch ID	Ticket Type	Qty	Price	Multi Unit	Status	Format	Promotion	Effective	Create Date	User	PO #
100118987	pdfNavy	107	Item Ticket	1	\$100.00	No	Pending	Item Ticket		May 4, 2014	Sep 19, 2014...		
100118938	pdfBrown	103	Item Ticket	2	\$125.00	No	Pending	Item Ticket		Sep 18, 2014...	Sep 17, 2014...	dev	
100136167	pi	100	Item Ticket	1	\$20.00	No	Pending	Item Ticket		Sep 3, 2014...	Sep 17, 2014...		
100550200	100250162 T...	92	Item Ticket	12	\$2.48	No	Pending	Item Ticket			Sep 17, 2014...		
106450106	v_CP	92	Item Ticket	1		No	Pending	Item Ticket			Sep 17, 2014...		
111150294	CVV1	86	Item Ticket	16	\$10.00	No	Pending	Item Ticket			Sep 11, 2014...		
100162669	pi	84	Auto Genera...	1	\$100.00	No	Pending	AGSN Ticket			Sep 11, 2014...		
106450106	v_CP	81	Item Ticket	27	\$100.00	No	Pending	Item Ticket			Sep 11, 2014...		
100145096	Tk_Item_Mu...	81	Item Ticket	19	\$10.00	No	Pending	Item Ticket			Sep 11, 2014...		
102150491	pi	79	Item Ticket	15	\$100.00	No	Pending	Item Ticket			Sep 11, 2014...		
108850259	Ak Test Item 2	76	Auto Genera...	1	\$12.00	No	Pending	AGSN Ticket			Sep 10, 2014...		
106450106	v_CP	75	Shelf Label	1	\$100.00	No	Pending	QR Code La...			Sep 10, 2014...		
106200422	test2	74	Shelf Label	1	\$100.00	No	Pending	QR Code La...			Sep 10, 2014...		
106200422	test2	74	Shelf Label	1		No	Pending	Shelf Label			Sep 10, 2014...		
100250200	100250162 T...	74	Shelf Label	12	\$2.56	No	Pending	Shelf Label			Sep 10, 2014...		
106450106	v_CP	74	Item Ticket	1		No	Pending	Item Ticket			Sep 10, 2014...		
100157048	pi	72	Shelf Label	1	\$115.00	No	Pending	QR Code La...			Sep 10, 2014...		
100114742	pi	72	Shelf Label	1	\$115.00	No	Pending	QR Code La...			Sep 10, 2014...		
100114751	pi	72	Shelf Label	1	\$115.00	No	Pending	QR Code La...			Sep 10, 2014...		
100250550	100250550 S...	71	Item Ticket	1	\$10.00	No	Pending	Item Ticket			Sep 10, 2014...		
105650406	CPNavy Item...	70	Item Ticket	20	\$20.00	No	Pending	Item Ticket			Sep 10, 2014...		
100157216	pdfNavy	69	Shelf Label	5	\$100.00	No	Pending	QR Code La...			Sep 10, 2014...		
100114497	pi	68	Auto Genera...	1	\$100.00	No	Pending	nrjnrj			Sep 10, 2014...		
100118022	ii	67	Auto Genera...	1	\$105.00	No	Pending	AGSN Ticket			Sep 9, 2014...		
100118031	ii	67	Auto Genera...	1	\$105.00	No	Pending	AGSN Ticket			Sep 9, 2014...		
100148476	pi	62	Auto Genera...	1	\$100.00	No	Pending	nrjnrj			Sep 9, 2014...		
100148467	pi	62	Auto Genera...	1	\$100.00	No	Pending	nrjnrj			Sep 9, 2014...		
40000058016	Default Shor...			1		No	Pending				Sep 8, 2014...	Rhonda	
100231643	Default Shor...			1		No	Pending				Sep 8, 2014...	Rhonda	
105750158	Simple Pack- T...			1		No	Pending				Sep 8, 2014...	Rhonda	
108850259	Ak Test Item 2			1		No	Pending				Sep 8, 2014...	Rhonda	
100157283	pdfNavy			5		No	Pending				Sep 8, 2014...	Rhonda	
100148467	pi		Item Ticket	1	\$100.00	No	Pending	Item Ticket		Jun 11, 2014...	Aug 28, 201...	Auto Create	
100148467	pi		Item Ticket	1	\$100.00	No	Pending	QR Code Tr...		Jun 11, 2014...	Aug 28, 201...	Auto Create	
100148467	pi		Shelf Label	1	\$100.00	No	Pending	QR Code La...		Jun 11, 2014...	Aug 28, 201...	Auto Create	
100148467	pi		Shelf Label	1	\$100.00	No	Pending	Shelf Label		Jun 11, 2014...	Aug 28, 201...	Auto Create	

From the Item Ticket List window, you can do the following:

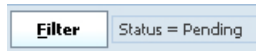
- [Filter the Item Ticket List](#)
- [Print Tickets](#)
- [Item Ticket Detail](#)
- [Update Tickets](#)
- [Update Ticket Format](#)
- [Refresh Ticket Quantity](#)
- [Delete Tickets](#)

From the Item Ticket List window, click **Back** to return to the Print Menu window.

Filter the Item Ticket List

The Item Ticket Filter window opens each time you click **Item Ticket** on the Print menu. At any time while the Item Ticket List window is open, click **Filter** to change how the list is filtered.

Current filtering is displayed next to the Filter button on the Item Ticket List window. If no filtering is displayed, all items are currently selected and listed.



To filter the item tickets listed on the Item Ticket List window, follow these steps:

1. Click **Filter**. The Item Ticket Filter window opens.

Figure 18–2 Item Ticket Filter Window

2. If you want to reset all filtering criteria to default values, click **Reset**. By default, the Item Ticket List displays item tickets in Pending status.
3. Enter or select filtering criteria as needed to select just the item tickets you want to list. All criteria are optional. If you leave a field blank or select All, all values will be included in your filtering selection. The list results will be limited to the system configuration parameter. The default is set to a maximum of 500 records returned.

Date Filters – Enter or select dates to select only those tickets that have an effective date between an Effective From Date and Effective To Date that you specify.

Hierarchy Filters – Select Department, Class, and Sub-Class to select only those tickets for a hierarchy that you specify.

Item – Enter or select an item ID to select only those tickets for a particular item.

PO Number – Enter a purchase order ID to select only those tickets created from a particular purchase order.

Format Type – Select a format type to select only the tickets for a particular type, such as Auto Generate SN, Item Ticket, Shelf Label, or select All.

Format Name – Select a format name to select only the tickets for a particular format name. These names are client specific such as Regular Price Label, Everyday Low Price, QR Code Label, QA Code Ticket, or select All.

Promotion ID – Enter a promotion ID to select only the tickets created from a particular promotion ID.

Status – Enter the style (parent id) to return all transaction level children in tickets. The default value is blank.

Style - Enter the style (parent ID) to return all transaction level children in tickets. The default value is blank.

User – Select a user to return all tickets created by a specific user or select All. The default value is All.

4. Click **Apply**. The tickets you have specified are listed in the Item Ticket List window.

Print Tickets

To print item tickets, follow these steps:

1. Enter search criteria to limit the item tickets you want displayed, and click **Apply**. (See [“Filter the Item Ticket List”](#) for more information.) The Item Ticket List window opens.

Note: You can print tickets from either the Item Ticket List window, the Item Ticket Detail window, the Item Ticket Batch List window and the Item Ticket Batch Detail window:

- If you want to print all the tickets or labels for an item as shown in the Item Ticket List window, continue with the next step.
 - If you need to update ticket information before you print tickets for an item, see [“Update Tickets.”](#)
 - If you are printing tickets for items that use automatically generated serial numbers (AGSN), see [“Print Tickets for Auto-Generated SNs.”](#)
-
-

2. Select the rows for the items for which you want to print tickets.
3. Click **Print Tickets**. The Printer Selection window opens.
4. Select the Printer from a drop-down list.
5. Click **OK**. A message is displayed to tell you the item tickets were printed.

Note: In addition to printing a label, the outgoing shipment may also need legal documentation, which may be provided by SIM or the manifesting system.

6. Click **OK** to return to the Item Ticket List.

Item Ticket Detail

To create a new ticket, follow these steps:

1. In the Item Ticket List window, select **Create**. The Item Ticket Detail window opens.

Note: The user may also get to this screen through the Item Ticket Batch Detail window.

Figure 18–3 Item Ticket Detail Window – Create Item Tickets

The screenshot shows the 'Store Inventory Management' application window. The title bar reads 'Store Inventory Management'. Below the title bar are several buttons: 'Save', 'Select UIN', 'Remove UIN', 'Ticket UDA', 'Print Tickets', 'Scanner', and 'Cancel'. The main window is titled 'Item: 100148467' and '100148467 - pi'. The form is divided into several sections:

- Price:**
 - Suggested Ticket Type: Shelf Label
 - Format Type: Shelf Label
 - Format Name: QR Code Label
 - Label Price: \$100.00
 - Auto Generate:
 - *Quantity: 1
 - Override Ticket Price: [text box]
 - Country of Manufacture: United States
 - Price per UOM: \$100.00 / EA
 - Batch ID: New
 - User: Auto Create
 - Promotion ID:
 - Effective Date: 6/11/2014
 - Multi Unit Price Changes:
 - Multi Unit Prices:
 - Multi Unit Quantity:
- Selected UINs:** A table with one column labeled 'UIN'.
- Additional Information:** A table with two columns labeled 'Name' and 'Value'.

At the bottom of the window, there is a status bar with the following text: 'Client Information', 'SIM User', '1211 - Boston', 'Item Ticket Detail', 'Help', and 'Jump'.

To create a new ticket, see Step 2 in "[Create Tickets](#)" for the process and more information.

Update Tickets

To update ticket information and print tickets, follow these steps:

1. In the Item Ticket List window, double-click the item you want to update. The Item Ticket Detail window opens.

Note: This window can also be accessed from the new Item Ticket Batch Detail window.

2. Update the following fields as needed:

Format Name – Select the format you want to use, such as QR Code, Item Tickets Shelf Label.

Quantity – Enter the number of tickets or labels you want to print.

Override Ticket Price – Enter an override ticket price for the item.

Country of Manufacture – Select country of manufacture.

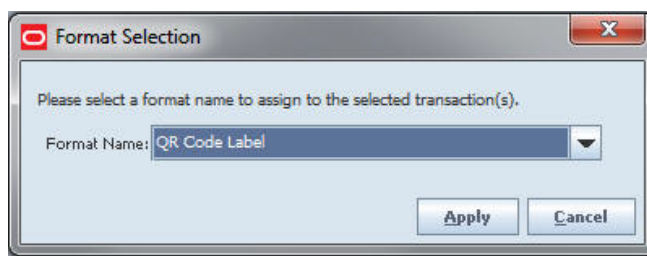
3. Select **Auto Generate** checkbox, if Format Type is Auto Generate and you want to generate serial numbers.
4. Select **Select UIN** if you want to select specific UINs to print. Do not select the Auto Generate check box if you want to select the UINs to print. This button is only available for the Format Type of Auto Generate SN. See "[Select UINs](#)" for the process and more information.
5. Select **Ticket UDA** if you want to add or remove additional information to print on a ticket. See "[Additional Attributes Entry](#)" for more information.
6. Click **Print Tickets**.
7. The Printer Selection window opens. Select a **Printer**.
8. Click **OK**. A message is displayed to tell you that the item tickets were printed.
9. Click **OK**.

Update Ticket Format

To update the format name assigned to a ticket, follow these steps:

1. Select one or more tickets.
2. Click **Update Format**. The Format Selection window opens.

Figure 18–4 Format Selection window



3. Select a **Format Name** from the drop down list.
4. Click **OK**. A format is assigned for the tickets selected. You are returned to the Item Ticket List window.

Refresh Ticket Quantity

To update ticket quantity based on the current stock on hand, follow these steps:

1. Select one or more tickets.
2. Click **Refresh Qty**.
3. Click **Yes** at the confirmation window.

Delete Tickets

To delete a ticket, follow these steps:

1. Select one or more tickets.
2. Click **Delete**.
3. Select **Yes** at the confirmation window. You are returned to the Item Ticket List window.

Item Ticket Batch List Window

The window lists ticket batches generated in SIM by various methods.

From this window you can:

[Filter the Item Ticket Batch List](#)

[Print Tickets](#)

[Create Ticket Batch](#)

[Update Ticket Format](#)

[Refresh the Ticket Quantity](#)

[Delete Ticket Batches](#)

Navigate: Main Menu > Print > Item Ticket Batch. The Item Ticket Batch List window opens.

Figure 18–5 Item Ticket Batch List Window

Batch ID	Tran ID	Ticket Reason	Print Date	Format Type	Total Items	Status
1		Daily Batch	11/24/2015	Item Ticket	1	Pending
2	42	Received Containers	11/24/2015	Item Ticket	1	Pending
3	41	Received Containers	11/24/2015	Item Ticket	1	Pending
4	388	Purchase Order	10/11/2015	Item Ticket	1	Pending
5	382	Purchase Order	10/19/2015	Item Ticket	1	Pending
6		Daily Batch	10/19/2015	Shelf Label	1	Pending
7	1003	Inventory	10/20/2015	Shelf Label	1	Pending
8		Manual	10/15/2015	Item Ticket	1	Pending
9		Manual	10/21/2015	Item Ticket	1	Pending

Fields include:

Batch ID – SIM-generated header level ticket ID

Tran ID – The ID of the transaction

Ticket Reason – Transaction type or event of the item that needs to be ticketed

Effective Date – Effective date of the event or transaction

Format Type – Type of format, such as item ticket, shelf label, or auto-generated SN

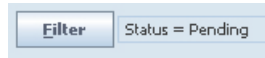
Total Items – Total number of items in the batch

Status – The state of the ticket batch

Filter the Item Ticket Batch List

The Item Ticket Filter window opens each time you click Item Ticket on the Print menu. At any time while the Item Ticket List window is open, click Filter to change how the list is filtered.

Current filtering is displayed next to the Filter button on the Item Ticket List window. If no filtering is displayed, all items are currently selected and listed.



To filter the item tickets listed on the Item Ticket List window, follow these steps:

1. Click **Filter**. The Item Ticket Batch Filter window opens.

Figure 18–6 Item Ticket Batch Filter Window

2. If you want to reset all filtering criteria to default values, click **Reset**. By default, the Item Ticket Batch List displays Ticket Batches in Pending status.
3. Enter or select filtering criteria as needed to select just the item tickets you want to list. All criteria are optional. If you leave a field blank or select All, all values will be included in your filtering selection.

Date Filters - Enter or select dates to select only those ticket batches that have an effective date between an Effective From Date and Effective To Date that you specify.

Hierarchy Filters - Select Department, Class, and Sub-Class to select only those ticket batches for a hierarchy that you specify.

Batch ID - Enter a Batch ID to select only a specific ticket batch.

Tran/Event ID - Enter a transaction or event id to select only those ticket batches for a particular transaction or event.

Ticket Reason - Enter or select a ticket reason to select only those ticket batches with a particular reason.

Format Type - Select a format type to select only the ticket batches for a particular type, such as Auto Generate SN, Item Ticket, Shelf Label, or select All.

Item - Enter or select an item ID to select only those ticket batches for a particular item.

Status - Select Canceled, Pending, Printed, or All. The default value is Pending.

Format Name - Select a format name to select only the ticket batches for a particular format name. These names are client specific such as Regular Price Label, Everyday Low Price, QR Code Label, QA Code Ticket, or select All.

Style - Enter the style (parent id) to return all transaction level children in ticket batches. The default value is blank.

User - Select a user to return all ticket batches created by a specific user or select All. The default value is All.

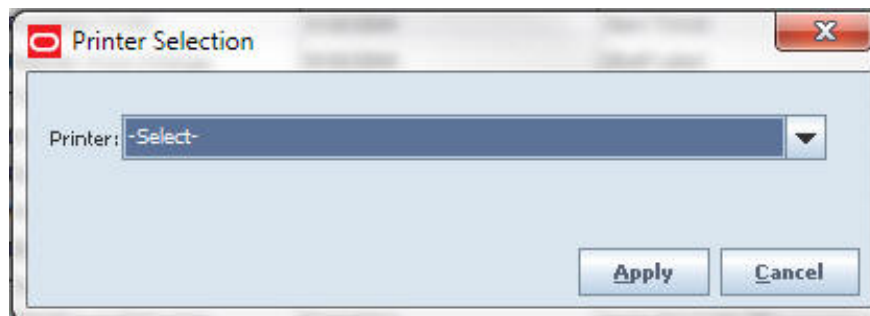
4. Click **Apply**. The ticket batches you have specified are listed in the Item Ticket Batch List window.

Print Tickets

To print tickets, follow these steps:

1. Select one or more ticket batches.
2. Click **Print Tickets**. The Printer Selection window opens.

Figure 18–7 Printer Selection Window

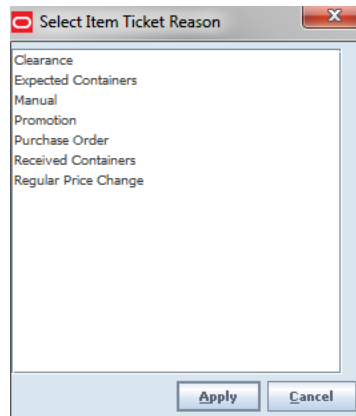


3. Select a Printer from the drop down list.
4. Click **Apply**. The tickets print and the window closes to return to the Item Ticket Batch List window.

Create Ticket Batch

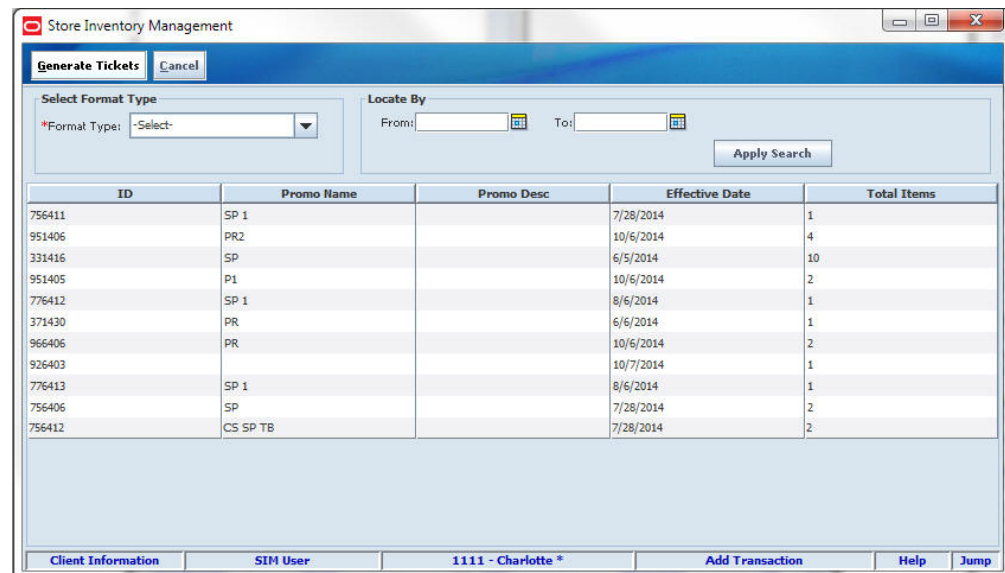
To create a new ticket batch, follow these steps:

1. Click **Create Batch**. The Select Item Ticket Reason window opens.

Figure 18–8 Select Item Ticket Reason Window

2. Select a reason and click **Apply**. The Add Transaction window opens.

Note: If Manual is selected as a reason, the Item Ticket Batch Detail window opens.

Figure 18–9 Add Transaction Window

Note: The Add Transaction window may vary slightly, depending on the Item Ticket Reason selected.

3. Select **Format Type** from drop down list.
4. Select a **From** and **To** Date.
5. Select a **Transfer From** location from the drop down list.
6. Click **Apply Search**.
7. Select one or more transactions.

8. Click **Generate Tickets** to create a new batch with this new ticket records based on the transactions selected.
9. Click **Yes** at the confirmation window. The Item Ticket Batch List window opens.

Update Ticket Batch

To update details for a ticket batch, follow these steps:

Navigate: Main Menu > Print > Item Ticket Batch. The Item Ticket Batch List window opens.

1. In the Item Ticket Batch List window, double-click the ticket batch you want to update. The Item Ticket Batch Detail window opens.

Figure 18–10 *Item Ticket Batch Detail Window*

2. Update the following fields as needed:
 - Auto Refresh Qty** - Select if you want the ticket quantity to refresh at the time of printing based on the current stock on hand.
 - Printer** - Set the printer for the entire batch if desired, otherwise the printer will be selected when Print Tickets is selected.
 - Print Date** - Enter a date the batch should be set to print.
3. Select **Refresh Qty**, if you want to update the ticket quantity based on current stock on hand, select the tickets to update.
4. Select **Remove Ticket**, if you want to remove one or more tickets from the batch, select the ticket to remove.
5. Select **Add Ticket**, if you want to add additional tickets to the batch. See "[Item Ticket Detail](#)" for more information.
6. To **Update Tickets**, double-click on a ticket to update it. See "[Update Tickets](#)" for more information.
7. Select **Update Format**, if you want to update the format assigned to tickets in the batch. See "[Update Ticket Format](#)" for more information.

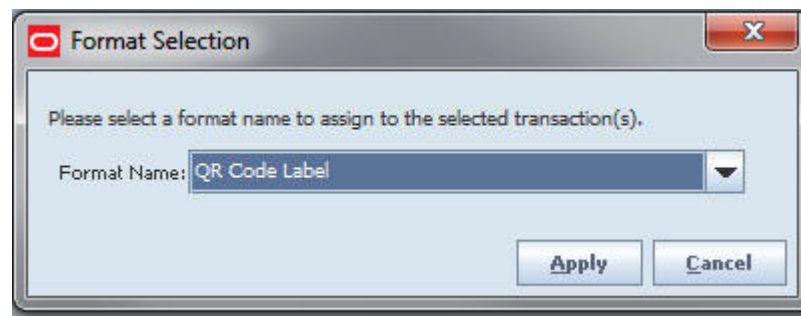
8. Select **Print Tickets**, you will need to select one or more tickets.
9. The Printer Selection window opens. Select a **Printer**.
10. Click **OK**. A message is displayed to tell you that the item tickets were printed.
11. Click **OK** to return to the Item Ticket Batch Detail.

Update Ticket Format

To update a ticket format, follow these steps:

1. Select one or more tickets to update.
2. Click **Update Format**. The Format Selection window opens.

Figure 18–11 Format Selection Window



3. Select a **Format Name** from the drop down list.
4. Click **OK**. The format name is updated for the select tickets. You are returned to the Item Ticket Batch List window.

Refresh the Ticket Quantity

To update a ticket quantity, follow these steps:

1. Select a batch.
2. Click **Refresh Qty**.
3. Click **Yes** at the confirmation window.

Delete Ticket Batches

To delete a ticket batch, follow these steps:

1. Select one or more batches.
2. Click **Delete**.
3. Select **Yes** at the confirmation screen. You are returned to the Item Ticket Batch List window.

Item Ticket Batch Detail - Manual

This window is accessed from the Create Batch window when the user selects Manual as a Select Item Ticket Reason.

Figure 18–12 Item Ticket Batch Detail Window

Item Ticket Batch Detail

Batch ID: 25 Ticket Reason: Direct Deliveries Printer: -Select-

Status: Pending External ID: *Format Type: Item Ticket

Auto Refresh Qty: Event/Transaction ID: 961 *Print Date: 9/4/2014

Total Items: 1

Filter: Status = Pending | Store = 1111

Print Sequence	Item	Item Description	Qty	Price	Multi Unit Price...	Effective Date	Status	Format Name

Client Information SIM User 1111 - Charlotte * Item Ticket Batch Detail Help Jump

To add detail to the item ticket batch:

1. Select a **Printer** from the drop down list.
2. Select a **Ticket Type** from the drop down list.
3. Enter a **Print Date**.
4. Select **Auto Refresh Qty** if the ticket quantity should be refreshed based on the current stock on hand when the ticket prints, if applicable.
5. Click **Filter** to filter the list. The Item Ticket Batch Filter window opens.

Figure 18–13 Item Ticket Batch Detail Filter Window

6. Select the **Department** from the drop down list.
7. Select the **Class** from the drop down list.
8. Select the **Sub-Class** from the drop down list.
9. Enter the **Item** or click Ellipses to search for the item to open the Item Lookup window.
10. Enter the **Style**.
11. Select the **Format Name** from the drop down list.
12. Select the **Status** from the drop down list.
13. Click **Apply**. The Item Ticket Batch Detail window opens.

Create Tickets

Enter search criteria to limit the item tickets you want displayed, and click **Apply**. (See "[Filter the Item Ticket List](#)" for more information.) The Item Ticket List window opens.

Navigate: Main Menu > Print > Item Ticket. The Item Ticket Filter window opens.

Note: The user may also get to this screen through the Item Ticket Batch Detail window.

To create a new item ticket, follow these steps:

1. Click **Create**. The Item Ticket Detail window opens.

Figure 18–14 Item Ticket Detail Window – Create Item Tickets

2. In the **Item** field, enter the item number, or click the Ellipsis button to look up the item.

In the Item Lookup window, enter search criteria as needed to find the item you want. (See “[Item Lookup](#)” in [Chapter 20](#) for more information about item lookup criteria.) Select the item you want and click **Apply** to return to the Item Request Detail window. Or click **Scanner** to scan the item. See “[Scan an Item \(Scanner Button\)](#)” in [Chapter 2](#) for more information.

3. From the **Format Type** drop-down list, select Auto Generate SN, Shelf Label, or Item Ticket.
4. From the **Format Name** drop-down list, select the format you want to use, such as QR Code, Item Tickets, Shelf Label.
5. Select Auto Generate check box, if Format Type is Auto Generate SN and you want to generate serial numbers.
6. In the **Quantity** field, enter the number of labels or tickets you want to print.
7. If there is an override price for the item, enter the override price to be printed on the labels or tickets in the **Override Ticket Price** field.
8. Select the **Country of Manufacture** from the drop-down list.
9. Click **Save** to save your changes and return to the Item Ticket List window.
10. Click **Select UIN** if you want to select specific UINs to print. Do not select the Auto Generate check box if you want to select the UINs to print. This button is only available for the Format Type of Auto Generate SN. See “[Select UINs](#)” for the process and more information.

11. Click **Remove UIN** if you want to select a specific UIN to delete. See "[Select UINs](#)" for the process and more information.
12. Click **Ticket UDA** if you want to add or remove additional information to print on a ticket. See "[Additional Attributes Entry](#)" for more information.
13. To print labels or tickets for this item, click **Print Tickets**. The Printer Selection window opens.
 - Select the **Printer** from a drop-down list.
 - Click **OK**. A message is displayed to tell you that the item tickets were printed.
14. Click **OK**.

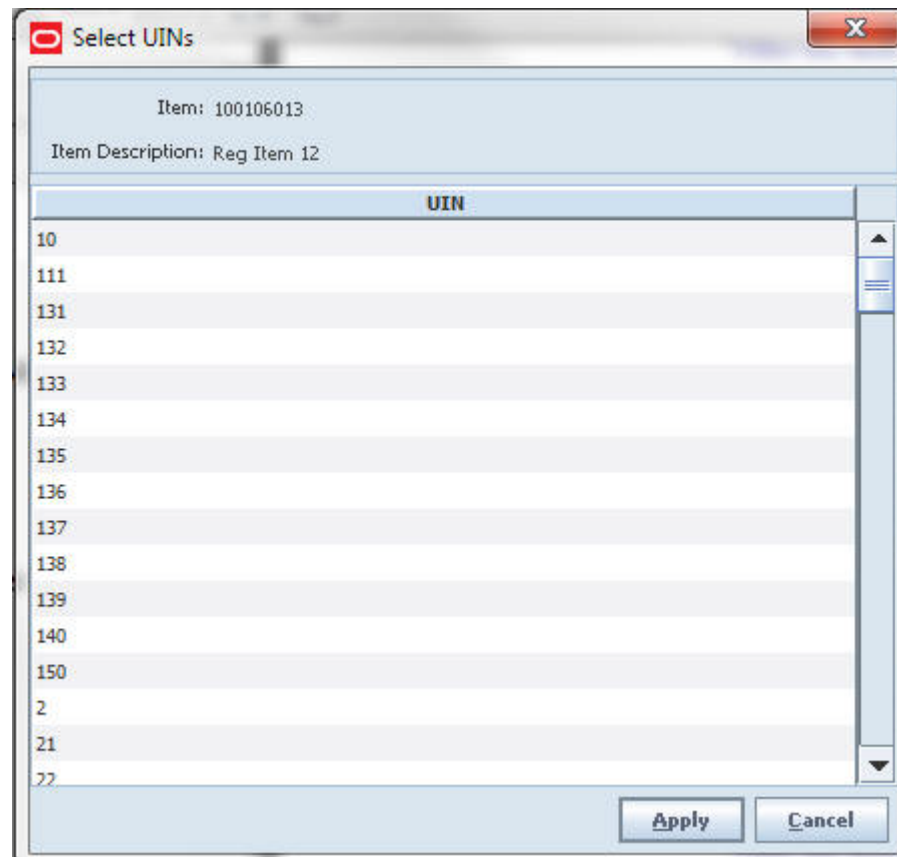
Select UINs

To select a UIN for an item, follow these steps:

1. If an auto generate number is not selected, or if automatic generation of serial numbers is not allowed for this item, click **Select UIN**. The Select UINs window opens.

Note: The user may also get to this screen through the Select UIN button or the Remove UIN button.

Figure 18–15 *Select UINs Window*



2. Select the UINs for which you want to print tickets.

- Click **Apply**. The selected UINs are listed in the Selected UINs list of the Item Ticket Detail window.
To remove UINs from the Selected UINs list, select the UINs and click **Remove UIN**.

Additional Attributes Entry

To enter additional item attributes, follow these steps:

- After clicking **Ticket UDA** in the Item Ticket Detail window, the Additional Attributes Entry window opens.

Figure 18–16 Additional Attributes Entry Window

Name	Value
Color	Gray
Size	M
Style	Long Sleeve
Warranty	1 Year

Additional Attribute

Attribute Name:

Attribute Value:

Apply **Add Attributes** **Remove Attributes** **Cancel**

- In the **Attribute Name** field, enter the attribute name.
- In the **Attribute Value** field, enter the attribute value.
- Click **Add Attributes**. The additional attribute field is populated with the information.
- Repeat the steps to add additional attributes.
- Click **Remove Attributes** after one or more items are selected to remove the attribute, if applicable.
- Click **Apply** to save your changes and return to the Item Ticket Detail window. The updated attributes display in the Additional Information area.

Print Tickets for Auto-Generated SNs

For items that use automatically generated serial numbers (AGSN), you can either select the serial numbers for which you want to print tickets, or you can generate the serial numbers when the tickets are printed if it is allowed for the item.

Note: This function allows printing of tickets only for items that use AGSNs internally generated by SIM. This function does not allow printing of tickets for serial numbers or other unique identifiers created outside of SIM.

To print tickets that contain AGSNs, follow these steps:

1. Double-click on an item in the Item Ticket List window. The Item Ticket Detail window opens. Or click Scanner to scan the item. See “[Scan an Item \(Scanner Button\)](#)” in [Chapter 2](#) for more information.

2. Select or enter values for the fields that are enabled.

Label Type - Select Item Auto Generate SN, Ticket, or Shelf Label.

Format - Select the format you want to use.

Auto Generate - If the item allows for automatic generation of serial numbers at printing, and you want to generate serial numbers, select this check box. If you want to select specific UINs to print, do not select this check box.

Quantity - Enter the number of tickets or labels you want to print.

Override Ticket Price - Enter an override ticket price for the item.

Country of Manufacture - Select country of manufacture.

3. Click **Print Tickets**.

A message is displayed to tell you that the item tickets were printed.

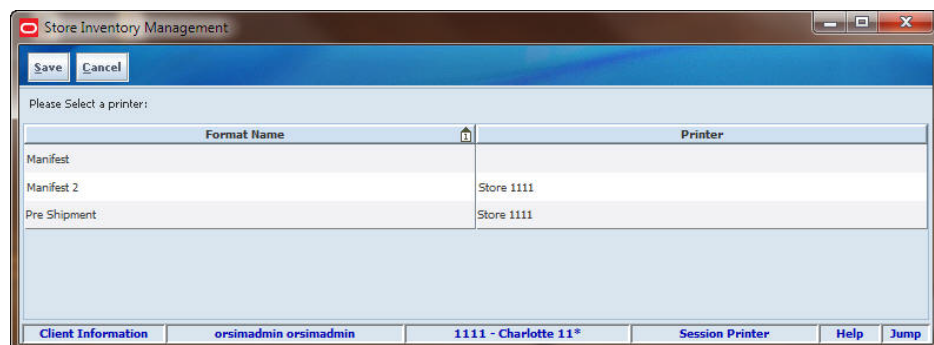
4. Click **OK**. You return to the Item Ticket List window.

Session Printer Setup

SIM can be setup to automatically print a manifest or pre-shipment ticket or label to a printer at another location.

Navigate: Main Menu > Print > Session Printer. The Session Printer window opens.

Figure 18–17 *Session Printer Window*



1. To change the printer location, select an location from the Printer drop-down list.
2. Click **Save** to save your changes and return to the Print Setup window.

Reports

SIM uses Oracle BI Publisher as the interface for SIM reports. SIM reports are custom-designed by your own organization. The BI Publisher interface is also customized to organize and present the reports available to SIM users.

Access SIM Reports

Navigate: Main Menu > Print > Reports. Oracle BI Publisher opens in your Web browser.

In SIM, the main menu remains displayed. You can use Oracle BI Publisher in your Web browser to view reports, and you can also continue to use SIM to perform other tasks.

For More Information

For information about using Oracle BI Publisher, see the *Oracle Business Intelligence Publisher User's Guide*.

The *Oracle Retail Store Inventory Management Implementation Guide* provides more information about reports for SIM system implementers and administrators.

Store Orders

Store ordering gives you the ability to view, create, modify, and approve orders to a supplier or transfer requests from a warehouse. Use store-level ordering to order items that are not set up for automatic replenishment, when items run short or demand increases.

Note: Depending on your system configuration, store orders may be limited to certain items that have a “store order” replenishment type. You can request all other items using item requests (see [Chapter 19](#), “Store Orders”).

Store Orders Window

Navigate: Main Menu > Inventory Mgmt > Store Orders. The Store Orders window opens.

Figure 19–1 Store Orders Window

Order ID	Source	Date	Status	Not Before Date	Not After Date	User
100000104073	Test	7/23/12	Pending	7/24/12	7/24/12	
100000116409	Test	10/15/12	Pending	11/2/12	11/30/12	
100000116411		10/15/12	Pending	10/17/12	10/19/12	
100000116474		10/15/12	Pending	10/17/12	10/19/12	
100000116487		10/15/12	Pending	10/17/12	10/19/12	
100000116498		10/15/12	Pending	10/17/12	10/19/12	
100000116783		10/15/12	Pending	10/17/12	10/17/12	
100000116786		10/15/12	Pending	10/16/12	10/16/12	
100000116787		10/15/12	Pending	10/16/12	10/16/12	
100000116790		10/15/12	Pending	10/16/12	10/16/12	
100000117174		10/16/12	Pending	10/18/12	10/20/12	
100000117185		10/16/12	Pending	10/18/12	10/20/12	
103000108839		7/23/12	Pending	7/23/12	7/23/12	NITGOPAL_RMS01
103000108936		7/23/12	Pending	7/23/12	7/23/12	NITGOPAL_RMS01
103000109037		7/23/12	Pending	7/24/12	7/24/12	NITGOPAL_RMS01
103000109136		7/23/12	Pending	7/23/12	7/23/12	RMS01APP
103000111237		9/19/12	Pending	9/19/12	9/19/12	RMS01APP
103000118838		10/24/12	Pending	10/24/12	10/24/12	RMS01APP

From the Store Orders window, you can do the following:

- [Filter the Store Orders List](#)
- [Create a Store Order](#)

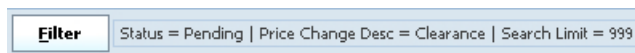
- [View or Edit a Store Order](#)
- [Approve a Store Order](#)
- [Cancel a Store Order](#)
- [Print a Store Order Report](#)

From the Store Orders window, click **Back** to return to the Inventory Management menu.

Filter the Store Orders List

At any time while the Store Orders window is open, you can also change how the list is filtered.

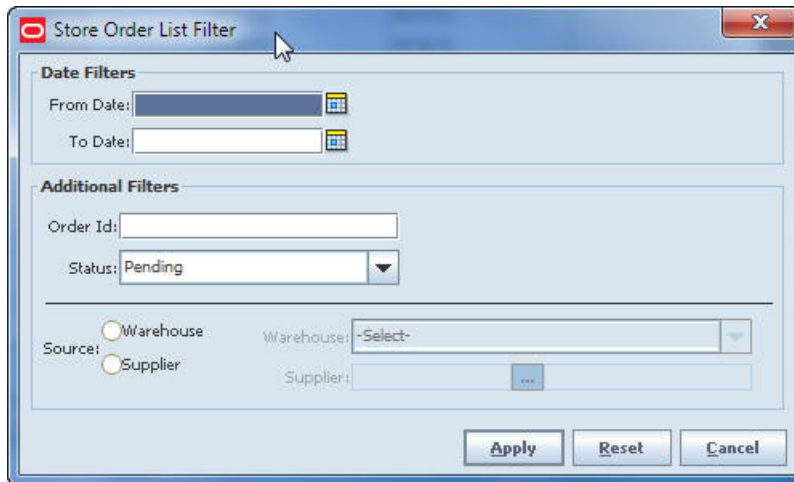
Current filtering is displayed next to the Filter button on the Store Orders window. If no filtering is displayed, all items are currently selected and listed.



To filter the store orders listed in the Store Orders window, follow these steps:

1. Click **Filter**. The Store Order List Filter window opens.

Figure 19–2 Store Order List Filter



2. Enter or select search values as needed to specify the store orders that you want to list. All values are optional. If you leave a field blank or select All, all values are included in the search.

Date Filters – Enter or select From Date and To Date values to limit the date range.

Order ID – Enter the Order ID.

Status – Select Approved, Closed, Pending, or All.

Warehouse or Supplier – Select either the Warehouse or Supplier radio button. For a warehouse, select the warehouse from the drop-down list. For a supplier, enter the supplier or click the **Ellipsis** button to look up the supplier. See “[Supplier Lookup](#)” in [Chapter 20](#) for more information.

3. Click **Apply**. You return to the Store Orders window, where your filter has been applied.

Create a Store Order

Create store orders to replenish items for which you have the authority to place orders from the store.

Navigate: Main Menu > Inventory Mgmt > Store Orders. The Store Orders window opens.

To create a store order, follow these steps:

1. Click **Create Order**. The Store Order Detail window opens.

Figure 19–3 Store Order Detail Window

Note: While the Store Order Detail window is open, you can also view details about items on the order. See “[View Item Details](#).”

2. Select the source of the item:
 - Supplier** – Enter a supplier ID or click the **Ellipsis** button to look up a supplier. In the Supplier Lookup window, locate and select the supplier you want. Click **Apply** to return to the Store Order Detail window.
 - Warehouse** – Select a warehouse from the drop-down list.
3. Specify a delivery date range:
 - a. In the **Not Before Date** field, enter a date or click the **Calendar** button to select the date.
 - b. In the **Not After Date** field, enter or select a date.

Note: For warehouse orders, the Not After Date field is disabled.

4. Enter item information:
 - a. Click **Add Item**. A new blank line is added to the store order list, or click **Scanner** to scan the item. See “[Scan an Item \(Scanner Button\)](#)” in [Chapter 2](#) for more information.
 - b. In the **Item** field, enter the item number, or click the **Ellipsis** button to look up the item.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Store Order Detail window. See “[Item Lookup](#)” in [Chapter 20](#) for more information.
 - c. Edit item information. Change values as needed in the following fields:
UOM – From the drop-down list, select the appropriate unit of measure.
Qty – If the displayed quantity is not correct, double-click and enter the correct quantity.
 - d. Repeat Steps a through c to add more items to the store order.
5. Click **Save**. Your order is saved and you return to the Store Orders window. Your order appears in Pending status.

View Item Details

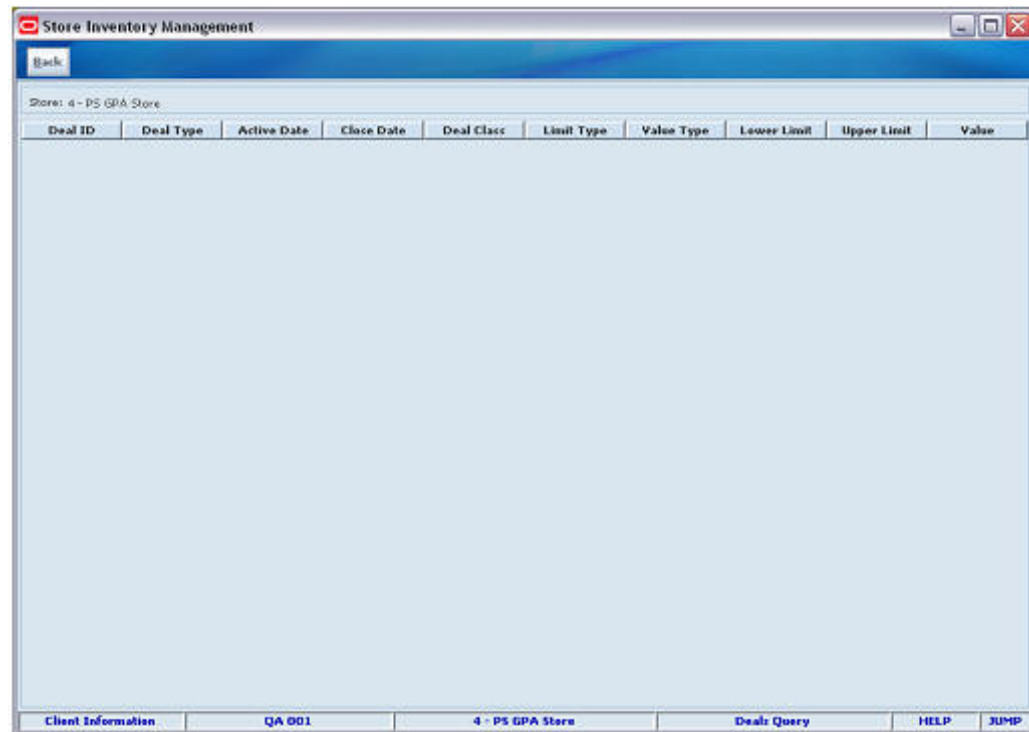
From the Store Order Detail window, you can look up details about items on the order. You can do the following:

- [Look Up Item Deals](#)
- [View Item Orders](#)
- [View Item Sales](#)

Look Up Item Deals

Deals may affect the order quantity for an item you order. To look up any deals that apply to an item on your order, follow these steps:

1. In the Store Order Detail window, select an item on your order.
2. Click **Deals Query**. The Deals Query window opens and displays available deals from the supplier of the selected item.

Figure 19–4 Deals Query Window

3. Click **Back** to return to the Store Order Detail window.
4. If needed, adjust your order quantities to comply with the deal.

View Item Orders

To view any other store orders for an item, follow these steps:

1. From the Store Order Detail window, select an item on your order.
2. Click **Item's Orders**. The Item Orders window opens and displays existing store orders for the selected item.

Figure 19–5 Item Orders Window

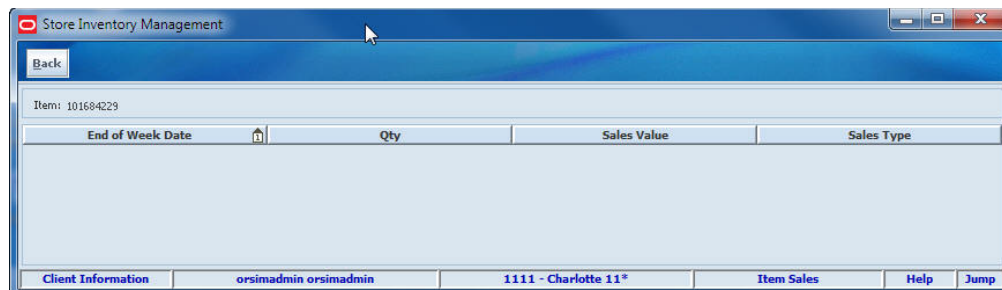
3. Click **Back** to return to the Store Order Detail window.
4. Adjust your order if needed.

View Item Sales

To view sales information about an item on your order, follow these steps:

1. From the Store Order Detail window, select an item on your order.
2. Click **Item's Sales**. The Item Sales window opens with store level sales information for the selected item.

Figure 19–6 Item Sales Window



3. Click **Back** to return to the Store Order Detail window.
4. Adjust your order if needed.

View or Edit a Store Order

Use this procedure to view details of a store order or update an order.

Navigate: Main Menu > Inventory Mgmt > Store Orders. The Store Orders window opens.

To view or make changes to an existing store order, follow these steps:

1. If you want to filter the orders listed, click **Filter**. See "[Filter the Store Orders List.](#)"
2. Double-click the pending store order that you want to edit. The Store Order Detail window opens.

Note: While the Store Order Detail window is open, you can also view details about items on the order. See "[View Item Details.](#)"

3. Update the store order as needed.

Change the Delivery Date

To change the delivery date, enter the date in the Request Delivery Date field or click **Calendar** to select the date.

Add Items to the Order

To add items to the order, follow these steps:

- a. Click **Add Item**. A new blank line is added to the store order list.
- b. In the Item field, enter the item number, or click the **Ellipsis** button to look up the item.

In the Item Lookup window, locate and select the item you want. Click **Apply** to return to the Store Order Detail window. See "[Item Lookup](#)" in [Chapter 20](#)

for more information. Or click **Scanner** to scan the item. See “[Scan an Item \(Scanner Button\)](#)” in [Chapter 2](#) for more information.

Edit Item Information

Change any of the following fields as needed:

UOM – From the drop-down list, select the unit of measure.

Pack Size – If the displayed pack size is not correct, enter the correct pack size.

Qty – If the displayed quantity is not correct, enter the correct quantity.

Remove Items from the Order

To remove items from the order, follow these steps:

- a. Select the line item that you want to remove.
- b. Click **Remove Item**. A message is displayed: “The selected line item(s) will be deleted. Do you want to continue?”
- c. Click **Yes**. The item is removed from the list.

Note: If the order was previously sent to the Oracle Retail Merchandising System, the quantity ordered is set to 0, but the item reappears on the order when the order is opened.

4. Click **Save** to return to the Store Orders window.

Approve a Store Order

Use this procedure to approve a store order, if you have the necessary permission to approve store orders.

Navigate: Main Menu > Inventory Mgmt > Store Orders. The Store Orders window opens.

To approve a store order, follow these steps:

1. If you want to filter the orders listed, click **Filter**. See “[Filter the Store Orders List](#).”
2. Double-click the pending store order that you want to approve. The Store Order Detail window opens.

Note: While the Store Order Detail window is open, you can also view details about items on the order. See “[View Item Details](#).”

3. Click **Approve**. The order is approved and you return to the Store Orders window.

Cancel a Store Order

Navigate: Main Menu > Inventory Mgmt > Store Orders. The Store Orders window opens.

Note: You can cancel only pending store orders.

To cancel a store order, follow these steps:

1. If you want to filter the orders listed, click **Filter**. See "[Filter the Store Orders List](#)."
2. Select the pending store orders that you want to cancel.
3. Click **Delete**. A message is displayed: "Are you sure you want to delete the selected Store Orders now?"
4. Click **Yes**. The selected orders are deleted. You are returned to the Store Orders window.

Print a Store Order Report

Use this procedure to produce a report for a store order.

Navigate: Main Menu > Inventory Mgmt > Store Orders. The Store Orders window opens.

Note: SIM reports can be customized, and they may be printed or displayed on the screen, depending on how your SIM system is set up. See "[Print or View SIM Reports and Other Output](#)" in [Chapter 2](#) for more information.

To produce a store order report, follow these steps:

1. If you want to filter the orders listed, click **Filter**. See "[Filter the Store Orders List](#)."
2. Select the store order for which you want a report.
3. Click **Print**. The Report Selection window opens.
4. In the **Printer** field, select the printer or other output device that you want to use.
5. Click **OK**. The report is printed.

The Lookups functions provide a variety of ways to look up detailed information about items, suppliers, and containers. From each lookup window, you can select options to view additional related details, without performing a separate search.

For example, when you look up an item, you can also look up related items.

You can also perform lookups while you are performing some other SIM tasks. For example, you can look up an item while you are preparing an item request, or you can look up a supplier while you are preparing a store order.

The Lookups functions are as follows:

- [Item Lookup](#)
- [Supplier Lookup](#)
- [Container Lookup](#)
- [Finisher Lookup](#)
- [Transaction History](#)

View Customer Orders

To view customer orders for the item, follow these steps:

1. Click **Customer Order**. The Item Customer Order window opens.

Figure 20–1 Item Customer Order Window

SIM Cust Order	Customer Order	Fulfillment Order	Type	Item	Item Description	UOM	Quantity	Create Date	Release Date	Comments
214	214	PO#12	Web Order	100272109	Item1		7	Nov 8, 2012 9:48:3...	Nov 8, 2012 9:48:36...	Test Item Comments

2. To view details about an order, double-click on the order. The Customer Order Detail window opens.

Figure 20–2 Customer Order Detail Window

Store Inventory Management

Save Notes Print

Customer Order ID: 2056 Order Create Date: 6/26/13 4:57 AM Delivery Type: Ship To Customer
 Fulfillment Order ID: F03 Order Release Date: 11/8/12 4:52 PM Carrier: LPS
 SIM Customer Order ID: 9901 Order Delivery Date: 11/10/12 4:52 PM Service:
 Order Status: In Progress Allow Partial Delivery: Yes
 Reservation Type: Web Order
 Comments: GS1test

Item	Descript...	UDM	Pack Size	Remaining Qty	Order Qty	Picked Qty	Delivered Qty	Canceled Qty	Last Upd...	Comments	Substitute
1001001001...	Fanta 60003	G	1	1000000	1000000	0	0	0	Jun 26, 201...	GS1test	

Client Information orsadmin orsadmin 1111 - Charlotte 11* Customer Order Detail Help Jump

3. Click **Save** to return to the Customer Order List window.
4. Click **Back** to return to the Item Detail window.

Item Lookup

You can look up all details about any inventory item, either as an inquiry or as part of another SIM task.

Notes: You can use the quick jump feature (**Jump**) while you are performing a task to look up an item. See [“Jump to Another Functional Area Using Quick Jump in Chapter 2.”](#)

Navigate: Main Menu > Lookups > Item Lookup. The Item Lookup window opens.

Figure 20–3 Item Lookup Window

Store Inventory Management

Back Search Reset

Search Type
 Item

Item:
 UIN:

Item Description:
 Brand:
 Dept: -Select-
 Class: -Select-
 Sub-Class: -Select-
 *Search Limit: Include Non-Ranged:

Item	Item Description	Primary Supplier	Primary Supplier Na...	Dept.	Class	Sub-Class
------	------------------	------------------	------------------------	-------	-------	-----------

Client Information SIM User 1211 - Boston Item Lookup Help Jump

To find items and view detailed information, follow these steps:

1. Under **Search Type**, select how to look up items:

Inventory – Search for items by inventory status.

Item – Search for items by item ID, vendor product number (VPN), or unique identification numbers (UIN).

Style – Search for items by the style. This can be done by entering the parent item ID.

Supplier – Search for items by the supplier of the items.

Warehouse – Search for items in a particular warehouse.

Finisher – Search for items by the finisher of the items.

UDA – Search for items by user-defined attributes.

2. Enter or select values for the pertinent search fields. The search fields displayed depend on your selection for Search Type (see the preceding step). Values for these fields are optional.

Lookup by Item

Item – Enter the unique number that identifies the item.

UIN – Enter the unique identification number (UIN) that identifies the item.

Lookup by Supplier

Supplier – Enter the identifier of the supplier of the items.

Primary Supplier – Select this check box if you want to search for items for which the selected supplier is the primary supplier.

Lookup by Warehouse

Warehouse – Select the warehouse from the drop-down list.

Lookup by Finisher

Finisher – Enter the finisher ID or look up the finisher.

Lookup by UDA

UDA – Specify values for up to three user-defined attributes of the items you want to find. You can specify up to one each of the three types of attributes that can exist for an item:

- **Text** – UDA values can be any free-form text.
- **Value** – UDA values can be specific values from a list.
- **Date** – UDA values are dates.

The following figure illustrates the three types of attributes and their values.

The screenshot shows a search interface with three UDA fields. The first field is labeled 'UDA: Publisher's Notes' and has a dropdown arrow. Below it is a text input field containing 'free-form text'. The second field is labeled 'UDA: Beer Brands*' and has a dropdown arrow. Below it is a value input field containing 'Corona'. The third field is labeled 'UDA: Discount Dates' and has a dropdown arrow. Below it is a date range input field with 'From: 9/23/11' and 'To: 9/30/11', each with a calendar icon.

3. You can further limit the search by specifying values for the following fields. Values for these fields are optional.

Item Description – Enter a brief explanation of the item.

Brand – Enter the brand name (string, case insensitive) to find items pertaining to a particular brand.

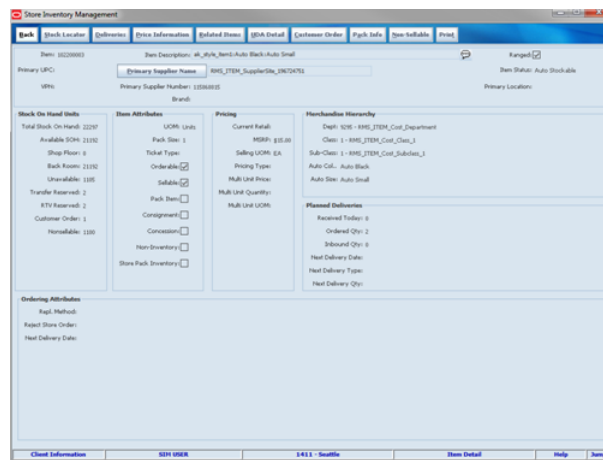
Dept – Select a department from the drop-down list.

Class – Select a class from the drop-down list.

Sub-Class – Select a subclass from the drop-down list.

4. In the **Search Limit** field, enter the maximum number of results that you want returned. You can enter an integer from 1 to 999; the default is 500.
5. To search for all items including those that do not have a location association with your location, select the **Include Non-Ranged** check box.
6. Click **Search**. The results that match your search criteria are listed.
7. Double-click the item you want. Details for the item are displayed in the Item Detail window.

Figure 20–4 Item Detail Window



From the Item Detail window, you can view other details about an item, as described in the following topics:

- [View Primary Supplier Details](#)
- [View the Number of Component Items in Each Pack \(Pack Items Only\)](#)
- [View the Pack Items for a Component Item](#)
- [View Inventory Available in Buddy Stores \(Stock Locator\)](#)
- [View Planned Deliveries](#)
- [View Current Pricing Information](#)
- [View Related Items](#)
- [View UDA Detail](#)
- [View UIN Detail](#)
- [Print an Item Report](#)
- [View Customer Orders](#)
- [View the Non-Sellable Inventory](#)

- [View Item Images](#)
8. To search for another item, click **Reset**. The search criteria fields are cleared so that you can enter new search criteria.
 9. Click **Back** to return to the Lookups menu.

View Primary Supplier Details

To view details about the primary supplier for the item, follow these steps:

1. Click **Primary Supplier Name**. The Supplier Detail window opens.

Figure 20–5 *Supplier Detail Window – Item Lookup*

The screenshot shows a window titled "Supplier Detail" with the following information:

- Supplier ID: 1000000055
- Supplier Name: Smoke Supp Site
- Address Type: Return Address (selected in a dropdown)
- Return Address** section:
 - Address 1: Smoke Supplier
 - Address 2:
 - City: 2700201
 - State: AL
 - Zip Code: 2700201
 - Phone #:
 - Contact: Smoke Supplier
 - Email Address:
 - Fax #:
- HQ Address** section:
 - Address 1: Smoke Supplier
 - Address 2:
 - City: 2700201
 - State: BA
 - Zip Code: 2700201
 - Phone #: 56 (789) 000-9876
 - Contact: Smoke Supplier
 - Email Address: prakash.sundaresh@oracle.com
 - Fax #: 56 (789) 000-9876
- Status: Active
- Returns Allowed: Yes
- Return Authorization Required: Yes
- Additional Suppliers** section:

Supplier ID	Supplier Name

A "Close" button is located at the bottom right of the window.

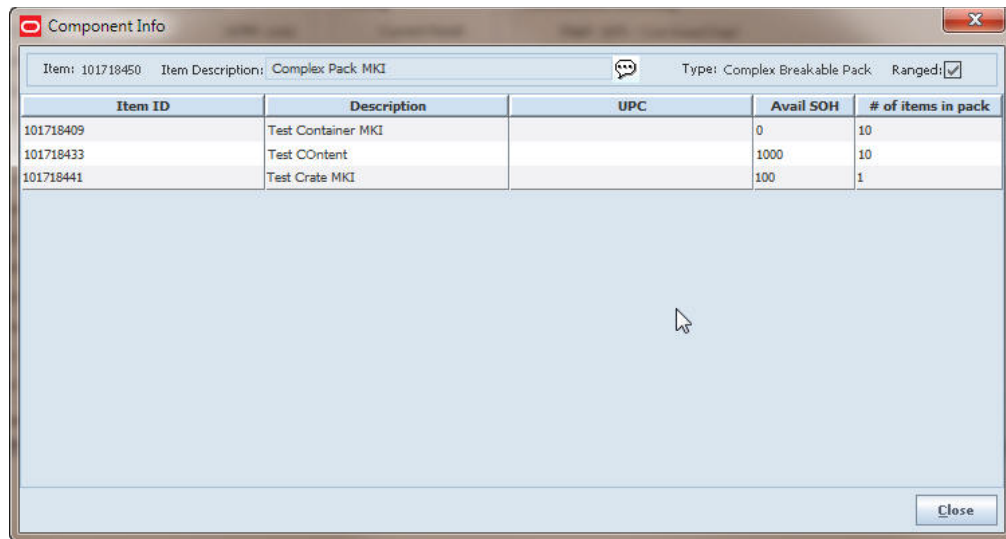
If there are additional suppliers for the item, they are listed at the bottom of the window.

2. Click **Close** to return to the Item Detail window.

View the Number of Component Items in Each Pack (Pack Items Only)

To view information about the component items for the current pack item, follow these steps:

1. Click **Component Info**. The Component Info window opens.

Figure 20–6 Component Info Window


The screenshot shows a window titled "Component Info" with a search bar containing "Item: 101718450" and "Item Description: Complex Pack MKI". The window type is "Complex Breakable Pack" and "Ranged" is checked. Below the search bar is a table with the following data:

Item ID	Description	UPC	Avail SOH	# of items in pack
101718409	Test Container MKI		0	10
101718433	Test Content		1000	10
101718441	Test Crate MKI		100	1

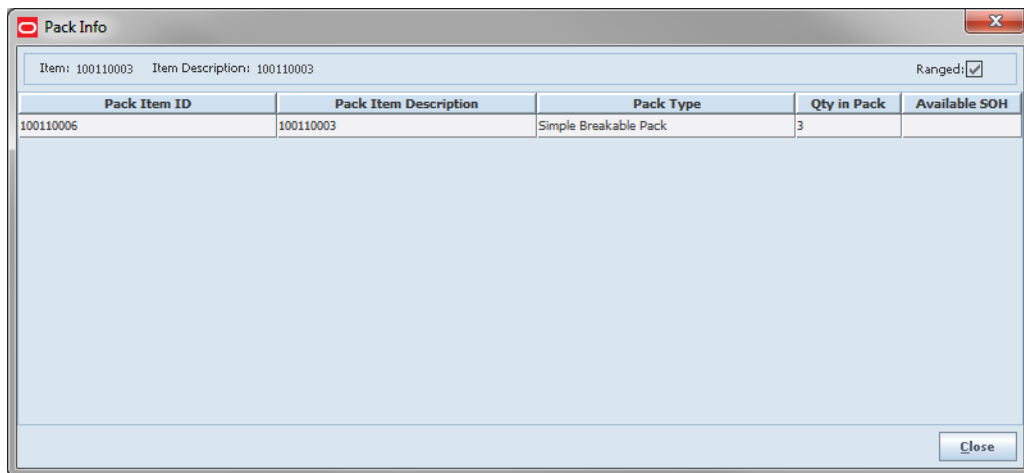
A "Close" button is located at the bottom right of the window.

2. Click **Close** to return to the Item Detail window.

View the Pack Items for a Component Item

To view inventory information about the pack items associated with the current component item, follow these steps:

1. Click **Pack Info**. The Pack Info window opens.

Figure 20–7 Pack Info Window


The screenshot shows a window titled "Pack Info" with a search bar containing "Item: 100110003" and "Item Description: 100110003". The window type is "Simple Breakable Pack" and "Ranged" is checked. Below the search bar is a table with the following data:

Pack Item ID	Pack Item Description	Pack Type	Qty in Pack	Available SOH
100110006	100110003	Simple Breakable Pack	3	

A "Close" button is located at the bottom right of the window.

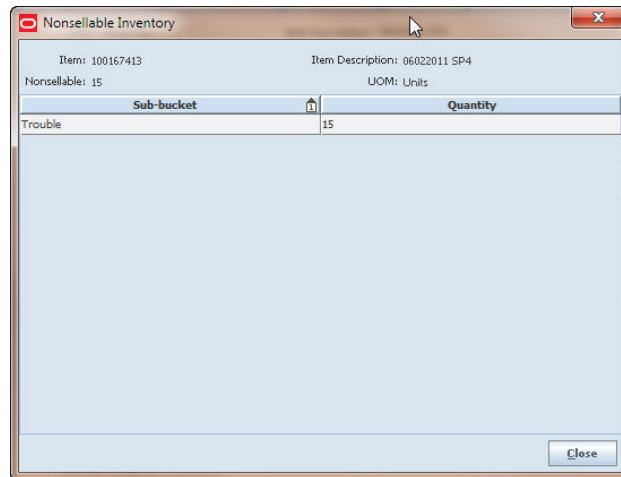
2. The user can select a pack from this screen. The Item Details screen opens with the selected pack's information displayed.
Once the user navigates to the details for the selected pack, the pack becomes the search item. The user will not automatically return to the original item.
3. Click **Close** to return to the Item Detail window.

View the Non-Sellable Inventory

To view the inventory that is non-sellable, follow these steps:

1. Click **Non-Sellable**. The Nonsellable Inventory window opens.

Figure 20–8 NonSellable Inventory Window



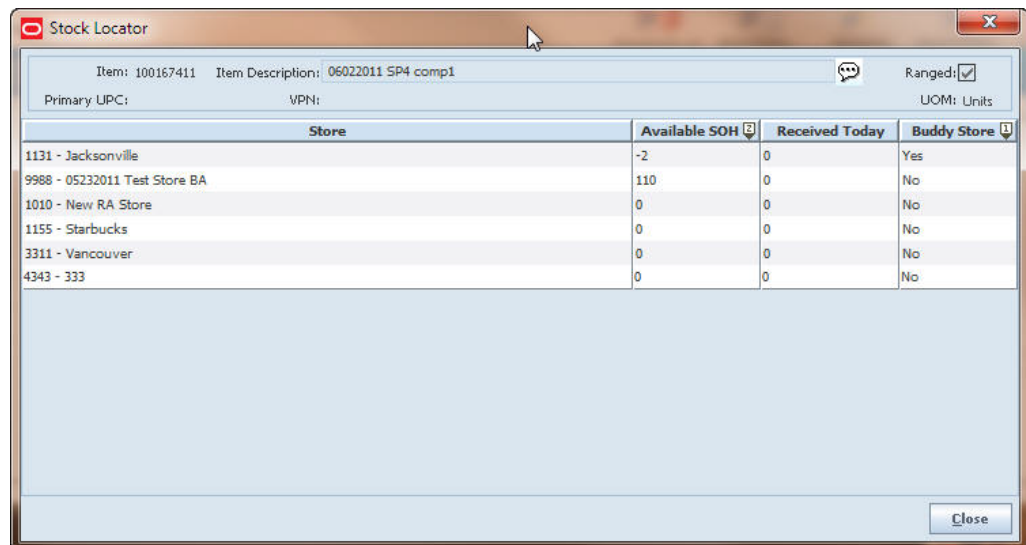
2. Click **Close** to return to the Item Detail window.

View Inventory Available in Buddy Stores (Stock Locator)

To view inventory available in other stores set up as buddy stores, follow these steps:

1. Click **Stock Locator**. The Stock Locator window opens.

Figure 20–9 Stock Locator Window



2. Click **Close** to return to the Item Detail window.

View Planned Deliveries

To view details about the incoming deliveries for the item, follow these steps:

1. Click **Deliveries**. The Planned Deliveries window opens.

Figure 20–10 Planned Deliveries Window - Item Lookup

Expected Date	Type	Source	Inbound Qty	Ordered Qty
5/14/2018	Allocation	1411 Seattle	0	2
	Allocation	1411 Seattle	0	0
	Allocation	1411 Seattle	0	0

The Allocation, Transfer, or Purchase Order displays the inbound quantity not yet received and the remaining quantity that remains to be shipped.

2. Click **Close** to return to the Item Detail window.

View Current Pricing Information

To view current pricing information for this item, follow these steps:

1. Click **Price Information**. The Price Information window opens.

Figure 20–11 Price Information Window

Price	Effective D...	End Date	Pricing Type	Multi Unit Price Change	Multi Unit Pr...	Multi Unit Quantity	Multi Unit UOM	Update Date
USD10.04	Aug 8, 2011 8:0...		Permanent	No				

2. Click **Close** to return to the Item Detail window.

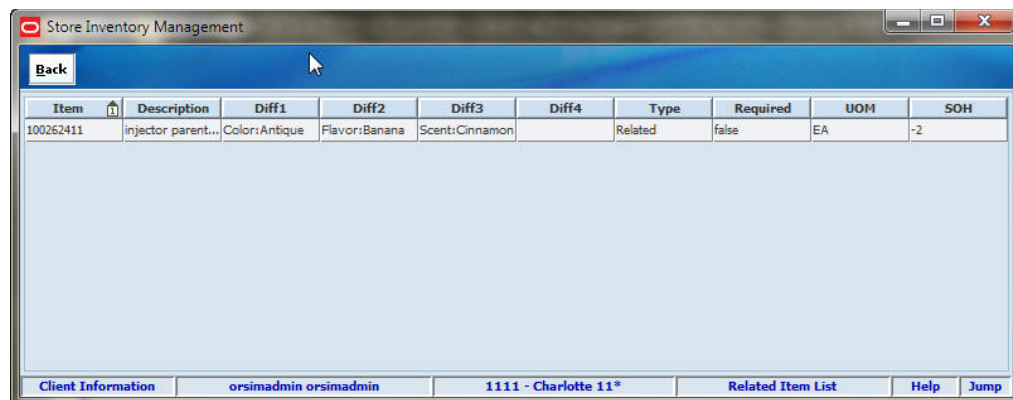
View Related Items

Related items are items that are related as they have the same parent item. For example, red shirt and black shirt can be related. They can also be items that are related because they are substitutes, cross sale, or upsale items.

To view items related to this item, follow these steps:

1. Click **Related Items**. The Related Item List window opens.

Figure 20–12 Related Item List Window



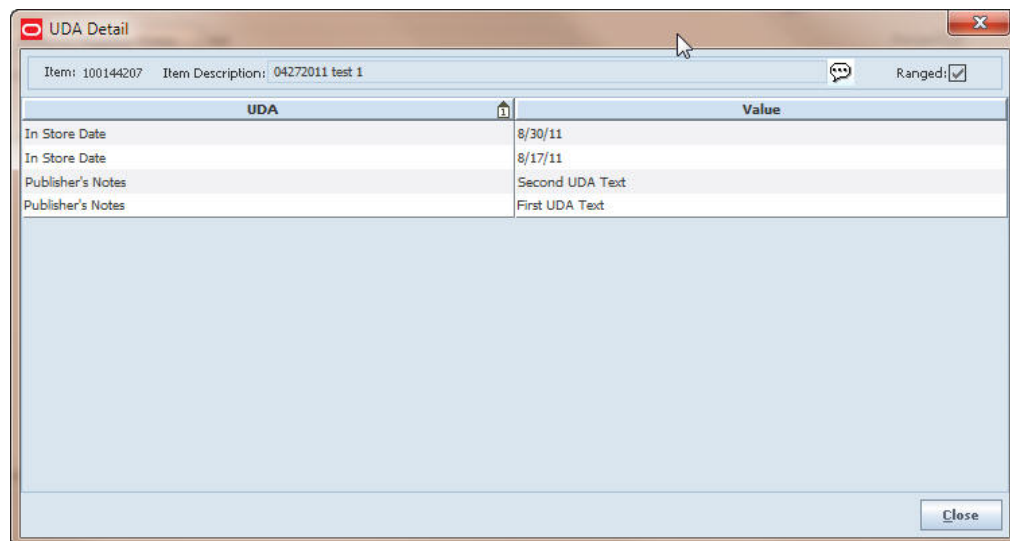
2. Double-click the item to view the item details. The Item Detail window opens.
3. Click **Back** to return to the Item Detail window.

View UDA Detail

To view the values of user-defined attributes (UDA) for the item, follow these steps:

1. Click **UDA Detail**. The UDA Detail window opens.

Figure 20–13 UDA Detail Window



2. Click **Close** to return to the Item Detail window.

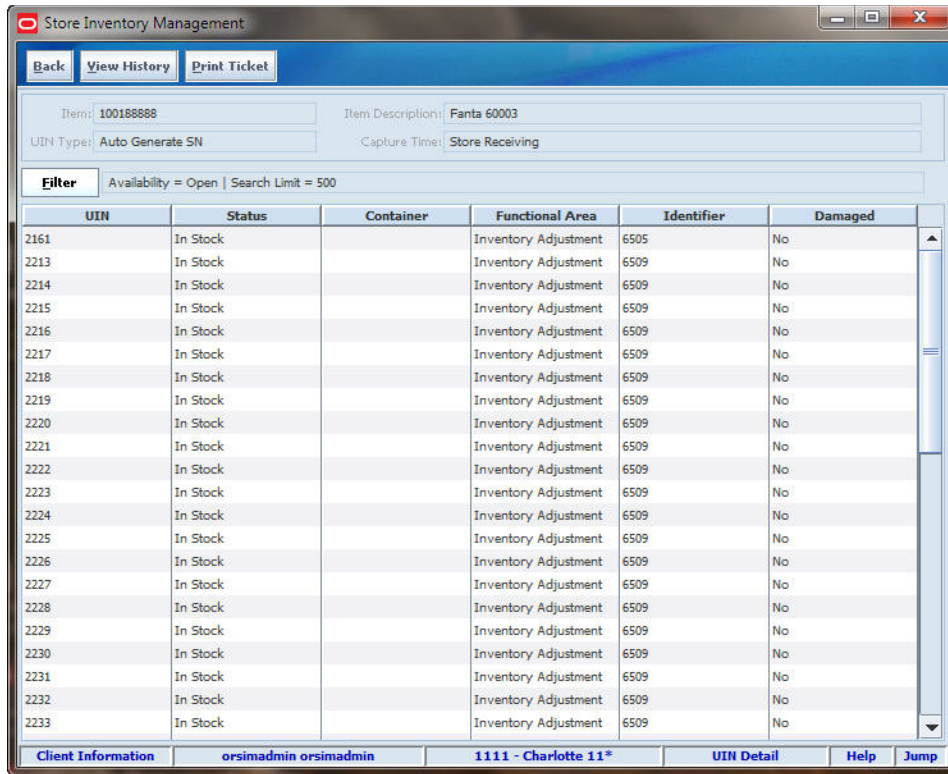
View UIN Detail

Note: The UIN Detail button is available only if you use unique identification numbers, and the item requires UINs.

To view details about UINs for an item, follow these steps:

1. Click **UIN Detail**. The UIN Detail window opens.

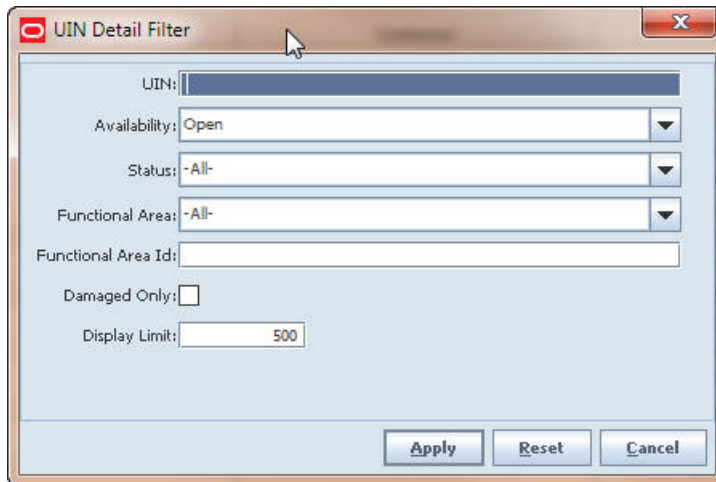
Figure 20–14 UIN Detail Window



From the UIN Detail window, you can optionally do the following:

- Update the status of the UIN; see “[View History and Update UIN Status](#)”
 - Print tickets for selected items; see “[Print Tickets](#)”
2. To filter the list of UIN Detail records, follow these steps:
 - a. From the UIN Detail window, click **Filter**. The UIN Detail Filter window opens.

Figure 20–15 UIN Detail Filter Window



- b. Enter or select search values as needed to specify the UIN records that you want to list. All values are optional. If you leave a field blank or select All, all values are included in the search.

UIN – Enter a UIN to limit the display to a specific UIN.

Availability – Select Open, Closed, or All. The default is Open.

Status – Select a status from the drop-down list. The default is All.

Functional Area – Select a functional area to filter records for a specific area.

Functional Area ID – Enter a functional ID to filter based on a specific transaction.

Damaged Only – Check the box to display UINs flagged as damaged.

Display Limit – Enter a value to limit the number of records to display. The default is 500.

3. Click **Apply** to return to the Item Detail window.

View History and Update UIN Status

Note: Updating the status of a UIN does not shift inventory positions. Changing the status of a UIN should only be done when errors are flagged in the UIN Resolution window, or when errors have resulted in incorrect UINs in the inventory.

To update the status of a UIN, follow these steps:

1. Select the UIN for which you want to update the status.
2. Click **View History**. The UIN History window opens.

Figure 20–16 UIN History Window

Store Inventory Management

Save Cancel

Item: 100219106 Item Description: BBQ Shelf

Serial Number: 615

Current Status: In Stock

Update Status: -Select-

Audit Information

Store	Date	Status	Functional Area	Identifier	User
1111 - Charlotte 11*	4/9/13 4:38 PM	In Stock	Inventory Adjustment	5021	Sue

Client Information orsadmin orsadmin 1111 - Charlotte 11* UIN History Help Jump

3. In the **Update Status** field, select the status for the selected UIN.
4. Click **Save** to return to the UIN Detail window.

Print Tickets

To print tickets for selected items, follow these steps:

1. Select the items for which you want to print tickets.
2. Click **Print Ticket**. You receive a message that tells you that the tickets were printed.
3. Click **OK**.

View Item Images

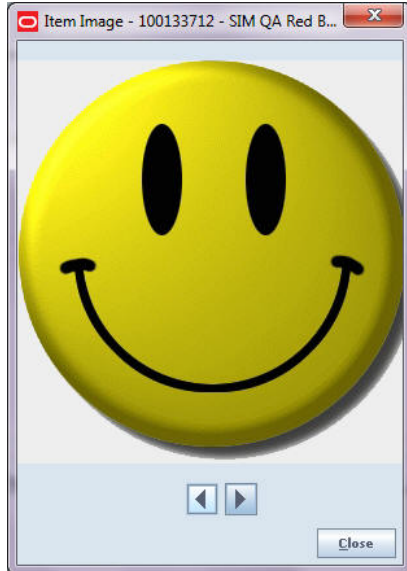
Note: Display of item images is an optional feature. This feature is available if stored images are available through your merchandising system, and if SIM is also configured to access and display those images. If item images are not supported on your SIM system, the Image button does not appear in the Item Detail window.

If the Image button is displayed, follow these steps to view the images that are available for the current item:

1. Click **Image**.

If at least one image is available for the item, the Item Image window opens to display the images.

Figure 20–17 Item Image Window



If there are no images for the current item, a message informs you that there are no images.

2. If there is more than one image for the current item, use the arrow buttons to view all available images in the Item Image window.
3. Click **Close** to return to the Item Detail window.

Print an Item Report

The Item Detail window also provides a Print option that produces an Item Detail Report.

Note: SIM reports can be customized, and they may be printed or displayed on the screen, depending on how your SIM system is set up. See “[Print or View SIM Reports and Other Output](#)” for more information.

To print an item report, follow these steps:

1. Click **Print**. The Report Selection window opens.
2. In the **Printer** field, select the printer or other output device you want to use.
3. Click **OK**. A message informs you that the Item Detail Report was printed.
4. Click **OK**.

Supplier Lookup

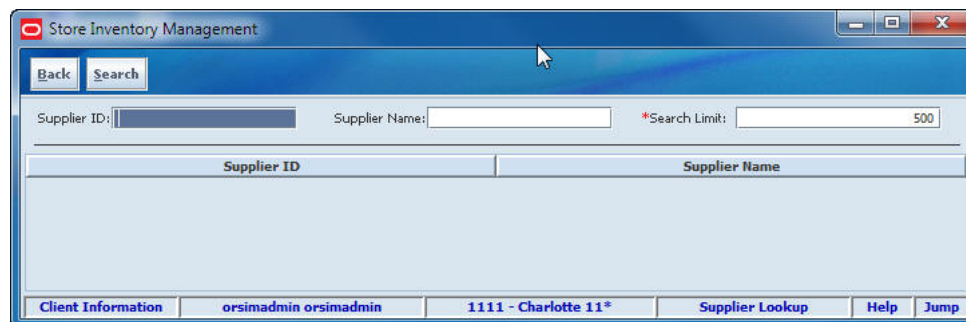
You can look up all details about any supplier, either as an inquiry or as part of another SIM task.

Note: If you are looking up a supplier while performing another SIM task, the procedures are similar:

1. Use the Supplier Lookup window to find the supplier you want.
 2. Select the supplier.
 3. Click **Back** to return to your task.
-

Navigate: Main Menu > Lookups > Supplier Lookup. The Supplier Lookup window opens.

Figure 20–18 *Supplier Lookup Window*



To find a supplier and view details about the supplier, follow these steps:

1. Enter a value in one of the fields:
 - Supplier ID** – Enter the number that identifies the supplier.
 - Supplier Name** – Enter the name of the supplier. You can enter a full or partial supplier name.

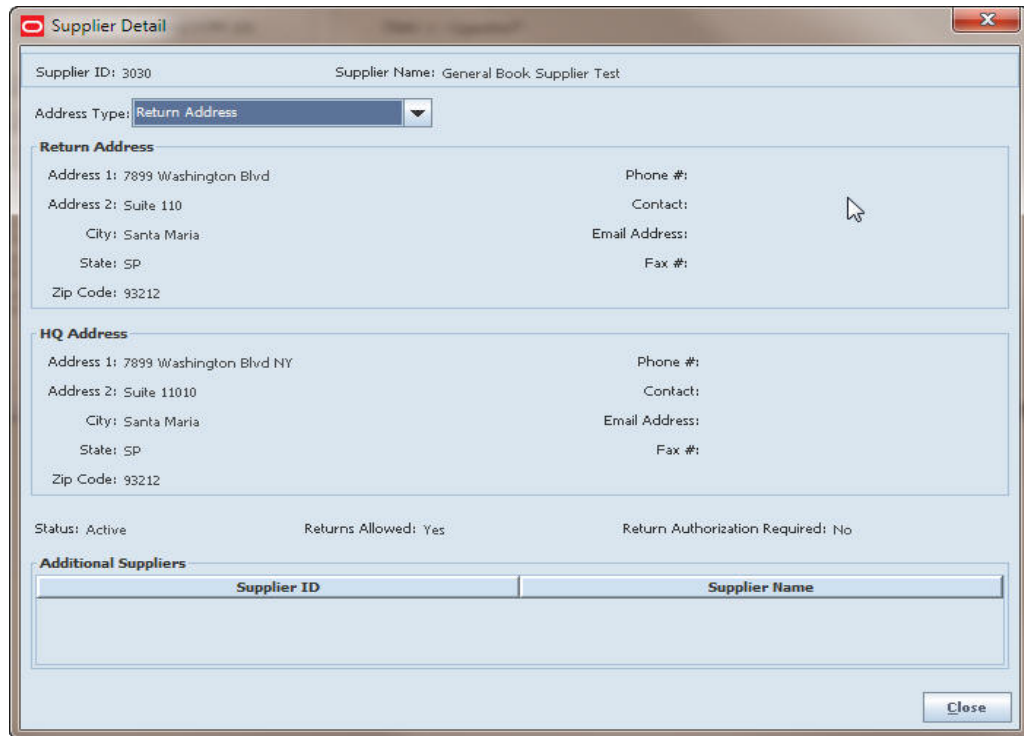
Search Limit – Enter the maximum number of results that you want returned. You can enter an integer from 1 to 999; the default is 500.

2. Click **Search**. The results that match your search criteria are displayed.

If more than one supplier meets the search criteria, the search results are listed in the Supplier Lookup window. Double-click the supplier you want. The Supplier Detail window opens.

If only one supplier meets the search criteria, the Supplier Detail window opens.

Figure 20–19 Supplier Detail Window



3. In the **Address Type** field, select the supplier address information that you want to view:
 - Postal Address
 - Return Address
 - Order Address
 - Invoice Address
 - Remittance Address
4. Click **Back**. You return to the Supplier Lookup window.
5. Click **Back** to return to the Lookups menu.

Container Lookup

Use this procedure to view details about containers.

Navigate: Main Menu > Lookups > Container Lookup. The Container Lookup window opens.

Figure 20–20 Container Lookup Window

Container ID	Type	Location	Direction	Status	Receive/Dispatch	Number of SKUs	Customer Order
0000004110019029	Store	2081 Company Closed d...	Incoming	New		1	No
0000004110022026	Store	2081 Company Closed d...	Incoming	In Progress		1	No
0000004110018622	Store	2081 Company Closed d...	Incoming	New		1	No
0000004110093623	Store	8024 PK Franchise Store...	Incoming	New		1	No
0000004110026055	Store	2081 Company Closed d...	Incoming	Received	10/1/2015	1	No
0000004110122023	Store	2081 Company Closed d...	Incoming	New		0	No
0000004110122022	Store	2081 Company Closed d...	Incoming	New		0	No
0000004110122029	Store	2081 Company Closed d...	Incoming	New		0	No
0000004110051054	Store	2081 Company Closed d...	Incoming	Damaged	8/26/2015	1	No
0000004110052023	Store	2081 Company Closed d...	Incoming	In Progress		1	No
0000004110054052	Store	2081 Company Closed d...	Incoming	Damaged	9/12/2015	1	No
0000004110041022	Store	2081 Company Closed d...	Incoming	New		0	No
0000004110042052	Store	2081 Company Closed d...	Incoming	New		0	No
0000004110042023	Store	2081 Company Closed d...	Incoming	In Progress		1	No
0000004110041022	Store	11111 LH Company Sta...	Incoming	Damaged	8/26/2015	1	No
0000004110049023	Store	2081 Company Closed d...	Incoming	In Progress		1	No
0000004110053036	Store	2081 Company Closed d...	Incoming	Received	8/27/2015	1	No
0000004110053041	Store	2081 Company Closed d...	Incoming	Damaged	8/27/2015	1	No
0000004110052026	Store	2081 Company Closed d...	Incoming	New		1	No
0000004110027077	Store	2081 Company Closed d...	Incoming	New		1	No
0000004110027084	Store	2081 Company Closed d...	Incoming	Damaged	8/16/2015	1	No
0000004110027093	Store	2081 Company Closed d...	Incoming	New		1	No
0000000000000000	Store	2081 Company Closed d...	Incoming	New		1	No
0000000000000000	Store	2081 Company Closed d...	Incoming	New		1	No
0000000000000000	Store	2081 Company Closed d...	Incoming	New		1	No
0000004110087623	Store	2081 Company Closed d...	Incoming	Received		1	No
0000004110037026	Store	2081 Company Closed d...	Incoming	In Progress	9/14/2015	1	No
0000002001001626	Store	2081 Company Closed d...	Outgoing	In Progress		0	No
0000002001001623	Store	2081 Company Closed d...	Outgoing	In Progress		0	No
0000002001001646	Store	2081 Company Closed d...	Outgoing	In Progress		0	No
0000002001001646	Store	11111 LH Company Sta...	Outgoing	Cancelled	8/24/2015	1	No

To find a container and view details, follow these steps:

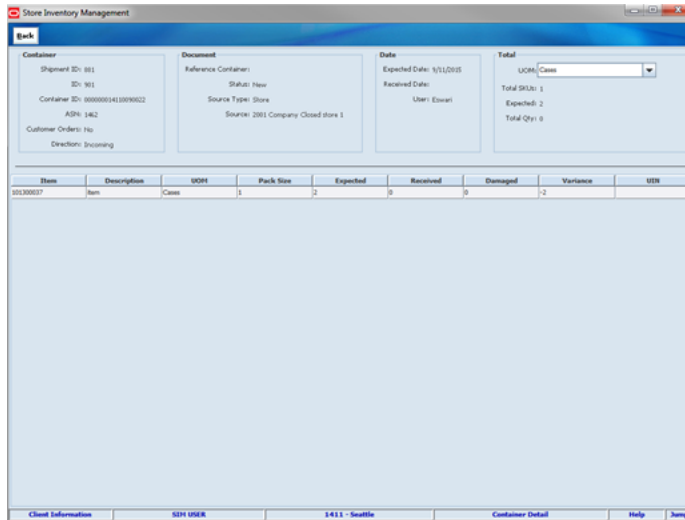
1. Enter a value for either one or both of the search criteria:

- In the **Container ID** field, enter all or part of the unique number that identifies the container.
- In the **Item** field, enter the item ID, vpn, and so on, that applies to the containers you want to find.
- In the **UIN** field, enter the UIN that applies to the containers that you want to find.
- In the **ASN** field, enter the ASN number to find the containers for a specific ASN.
- In the **Type** field, select Store, Warehouse, or Finisher, to return all containers that belong to a specific type of transaction. Both incoming and outgoing containers will display when Store is selected.

If you enter both Container ID and UIN values, only containers that satisfy both search criteria will be returned by the search.

2. In the **Search Limit** field, enter the maximum number of results that you want returned. You can enter an integer from 1 to 999; the default is 500.
3. Click **Search**. The results that match your search criteria are displayed.
4. To view additional information about a container, double-click on that container. The Container Detail window opens.

Figure 20–21 Container Detail Window



5. Click **Back** to return to the Container Lookup window.
6. Click **Back** to return to the Lookups menu.

Finisher Lookup

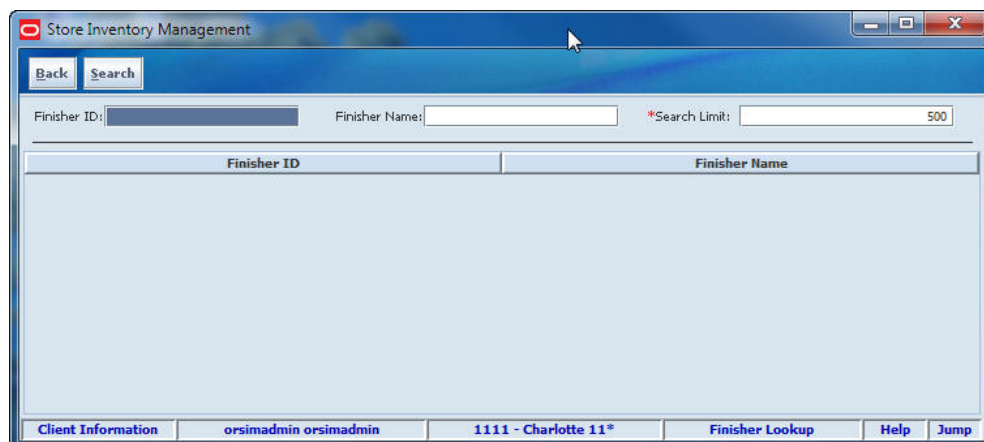
You can look up all details about any external finisher, either as an inquiry or as part of another SIM task.

Note: If you are looking up a finisher while performing another SIM task, the procedures are similar:

1. Use the Finisher Lookup window to find the finisher you want.
 2. Select the finisher.
 3. Click **Back** to return to your task.
-

Navigate: Main Menu > Lookups > Finisher Lookup. The Finisher Lookup window opens.

Figure 20–22 Finisher Lookup Window



To find a finisher and view details about the finisher, follow these steps:

1. Enter a value in one of the fields:

Finisher ID – Enter the number that identifies the finisher.

Finisher Name – Enter the name of the finisher. You can enter a full or partial supplier name. You can enter an integer from 1 to 999; the default is 500.

Search Limit – Enter the maximum number of results that you want returned. You can enter an integer from 1 to 999; the default is 500.

2. Click **Search**. The results that match your search criteria are displayed.

If more than one finisher meets the search criteria, the search results are listed in the Finisher Lookup window. Double-click the finisher you want. The Finisher Detail window opens.

If only one finisher meets the search criteria, the Finisher Detail window opens.

Figure 20–23 *Finisher Detail Window*

Store Inventory Management

Back

Finisher ID: 1414 Principal Country: BR Language: 1
 Finisher Name: Ext Finisher Currency: BRL Payment Terms: 100

Contact Person: Lakshmi Fax: Email:
 Phone: (9) 870-8793 Telex:

Select Address Type: Return Address

Return Address

Address 1: Phone #:
 Address 2: Contact:
 City: Email Address:
 State: Fax #:
 Zip Code:

HQ Address

Address 1: ANand nagar Phone #:
 Address 2: Contact:
 City: Chennai Email Address:
 State: GO Fax #:
 Zip Code:

Status: Active VAT Region: Transfer Entity ID: Org Unit Id: 111111111

Client Information orsimadmin orsimadmin 1111 - Charlotte 11* Finisher Detail Help Jump

3. In the **Select Address Type** field, select the finisher address information that you want to view:
 - Postal Address
 - Return Address
 - Order Address
 - Invoice Address
 - Remittance Address
4. Click **Back**. You return to the Finisher Lookup window.

- Click **Back** to return to the Lookups menu.

Transaction History

All transactions in SIM that have stock movements are displayed in Transaction History window. That may include:

- Stock Counts
- Transfer Receiving
- DSD Receiving
- Receiver Unit Adjustments (all receiving types)
- Return to Vendor
- ReSA - Late Sales: Transactions
- Wastage
- Inventory Adjustments
- POS Transactions - Sales/Returns

To view details of transaction history, perform the following steps:

Note: Receiving Unit Adjustments will only be created if coming from an external source. Receipt Reversal and Damage Reversal will be used since the full receipt is reversed when adjusting a container from a receipt.

Navigate: Main Menu > Lookups > Transaction History. The Transaction History Filter window opens.

Figure 20–24 Transaction History Filter Window

- Enter or select search values to use to filter the list:
 - Date Filters** - Select the date range by entering the dates or using the Calendar feature.

Tran Type – To filter the list to show only transaction types, select the transaction type from the drop-down list.

Reason – To filter the list by transaction reason, select a reason from the drop-down list.

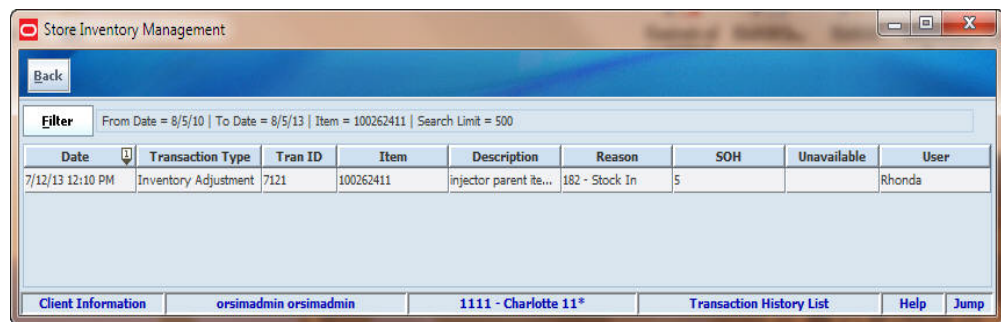
Item - To filter the list to show only history for an item, enter the item ID, or click the **Ellipsis** button to open the Item Lookup window. In the **Item Lookup** window, look up and select the item you want, and then click **Apply** to return to the Transaction History Filter window.

User – To filter the list by a user name, enter the user name in the User field.

Search Limit – Enter the maximum number of results that you want returned. You can enter an integer from 1 to 999; the default is 500.

2. Click **Apply**. The transactions that match your search criteria are listed in the Transaction History List window.

Figure 20–25 Transaction History List Window



View a Transaction History

To view the details of a transaction history, follow these steps:

1. If the transaction history you want to view are not listed, filter the list. See [“View a Transaction History.”](#)

If a transaction history you want to view is listed, double-click the transaction. The detail window for that specific transaction will open. For example, click an RTV Transaction History. The RTV Detail window opens.

2. Click **Back** to return to the Transaction History List window.

Customer Order Management

Use this procedure to view details of any transaction pertaining to customer orders.

The Customer Order Management List window can display all customer orders, customer order picks, customer order reverse picks, customer order deliveries, store to store transfers, warehouse deliveries, and direct deliveries that pertain to customer orders that are active.

Navigate: Main Menu > Customer Order Mgmt. The Customer Order Management List window opens.

Figure 21–1 Customer Order Management List Window

Tran Id	Tran Type	Customer Order	From	To	Date	Tran Status	Total SKUs	User
999	Customer Order	999	-	-	Oct 24, 2012 8:36:00 ...	In Progress	1	
1001	Customer Order	1001	-	-	Oct 25, 2012 6:13:51 ...	In Progress	1	
100	Customer Order	100	-	-	Oct 25, 2012 9:13:53 ...	In Progress	1	
101	Customer Order	101	-	-	Oct 25, 2012 9:20:46 ...	In Progress	1	
102	Customer Order	102	-	-	Oct 25, 2012 11:16:05 ...	In Progress	1	
1002	Customer Order	1002	-	-	Oct 28, 2012 2:43:51 ...	In Progress	1	
782	Delivery	1001	1111 - Charlotte 11*	1111 - Charlotte 11*	Oct 29, 2012 1:16:41 ...	In Progress	1	esvarim
1003	Customer Order	1003	-	-	Oct 29, 2012 3:30:39 ...	In Progress	1	
103	Customer Order	103	-	-	Oct 29, 2012 10:53:10 ...	In Progress	3	
104	Customer Order	104	-	-	Oct 30, 2012 12:01:45 ...	In Progress	2	
107	Customer Order	107	-	-	Oct 30, 2012 12:19:15 ...	In Progress	1	
110	Customer Order	110	-	-	Oct 30, 2012 12:27:28 ...	In Progress	1	
644	Pick	1003	-	-	Oct 30, 2012 6:50:42 ...	New	1	varsha
1007	Customer Order	1007	-	-	Oct 30, 2012 3:35:07 ...	In Progress	1	
1008	Customer Order	1008	-	-	Oct 30, 2012 3:37:35 ...	In Progress	1	
841	Pick	1006	-	-	Nov 5, 2012 2:47:11 ...	New	1	varsha
963	Delivery	1002	1111 - Charlotte 11*	1111 - Charlotte 11*	Nov 5, 2012 11:57:30 ...	In Progress	1	esvarim
983	Delivery	1008	1111 - Charlotte 11*	1111 - Charlotte 11*	Nov 6, 2012 5:47:30 ...	In Progress	1	esvarim

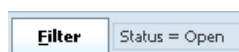
From the Customer Order Management List window, you can do the following:

- [Filter the Customer Order Management List](#)
- [View a Customer Order](#)

Click **Back** to return to the Admin menu.

Filter the Customer Order Management List

The list can be filtered. If the list is currently filtered, the active filtering is displayed next to the Filter button.



To change the filtering of the orders listed in the Customer Order Management List window, follow these steps:

1. Click **Filter**. The Customer Order Management Filter window opens.

Figure 21–2 Customer Order Management Filter Window

2. Enter or select search values to use to filter the list:

From/To Dates – If you know the From and/or To Dates, enter that value in the From Date or To Date fields.

Customer Order ID – If you know the customer order ID, enter that value in the Customer Order ID field.

Status – To filter the list by order status, select a value from the Status drop-down list.

Tran Type – To filter the list by transaction type, select a value from the Tran Type drop-down list.

Tran Status – To filter the list by transaction status, select a value from the Tran Status drop-down list.

Item – To filter the list to show only orders for an item, enter the item ID, or click the **Ellipsis** button to open the Item Lookup window. In the **Item Lookup** window, look up and select the item you want, and then click **Apply** to return to the Customer Order Lookup Filter window.

User – To filter the list by user name, enter the user name in the User field.

Tran ID – If you know the Transaction ID, enter that value in the Tran ID field.

Carrier – If you know the Carrier, select a value from the drop-down list.

Service – If you know the Service information, select the value from the drop down list.

Search Limit – Enter the number of order results to display.

3. Click **Apply**. The customer orders that match your search criteria are listed in the Customer Order Management List window.

View a Customer Order

Navigate: Main Menu > Customer Order Mgmt > Customer Order. The Customer Order List window opens. This window displays the details for orders, such as layaways and pickups, as well as the web order customer orders.

Figure 21–3 Customer Order List Window

SIM Customer Order	Customer Order	Fulfillment Order	Type	Status	Total SKUs	Create Date	Release Date	Comments
6162	639	639	Web Order	In Progress	1	Jan 28, 2013 11:38:39 ...	Nov 8, 2013 4:52:12 PM	Testing the External C...
6462	7013	7013	Web Order	In Progress	1	Feb 1, 2013 12:54:57 ...	Nov 8, 2013 4:52:12 PM	Testing the External C...
441	705	705	Web Order	In Progress	1	Jan 14, 2013 3:08:52 AM	Nov 8, 2013 4:52:12 PM	Testing the External C...
6641	711	711	Web Order	In Progress	1	Feb 7, 2013 12:59:02 ...	Nov 8, 2013 4:52:12 PM	Testing the External C...
6941	720	720	Web Order	In Progress	2	Feb 13, 2013 3:09:09 ...	Nov 8, 2013 4:52:12 PM	Testing the External C...
6943	723	723	Web Order	In Progress	1	Feb 13, 2013 3:33:26 ...	Nov 8, 2013 4:52:12 PM	Testing the External C...
7141	744	744	Web Order	In Progress	1	Feb 20, 2013 1:22:24 ...	Nov 8, 2013 4:52:12 PM	Testing the External C...
7142	745	745	Web Order	In Progress	1	Feb 20, 2013 1:23:14 ...	Nov 8, 2013 4:52:12 PM	Testing the External C...
7143	746	746	Web Order	In Progress	1	Feb 20, 2013 1:27:06 ...	Nov 8, 2013 4:52:12 PM	Testing the External C...
7181	748	748	Web Order	In Progress	1	Feb 21, 2013 5:02:09 ...	Nov 8, 2013 4:52:12 PM	WHD test
7251	758	758	Web Order	In Progress	1	Feb 24, 2013 10:35:54 ...	Nov 8, 2013 4:52:12 PM	Testing the External C...
7262	759	759	Web Order	In Progress	1	Feb 24, 2013 10:45:14 ...	Nov 8, 2013 4:52:12 PM	Testing the External C...
7284	763	763	Web Order	In Progress	1	Feb 25, 2013 4:38:54 ...	Nov 8, 2013 4:52:12 PM	WHS test
7285	764	764	Web Order	In Progress	3	Feb 25, 2013 4:40:34 ...	Nov 8, 2013 4:52:12 PM	WHS test
7286	765	765	Web Order	In Progress	1	Feb 25, 2013 5:01:48 ...	Nov 8, 2013 4:52:12 PM	WHS test
7301	768	768	Web Order	In Progress	1	Feb 25, 2013 11:46:42 ...	Nov 8, 2013 4:52:12 PM	WHS test
7321	769	769	Web Order	In Progress	2	Feb 26, 2013 1:43:52 ...	Nov 8, 2013 4:52:12 PM	WHS test
7332	770	770	Web Order	In Progress	2	Feb 26, 2013 1:44:17 ...	Nov 8, 2013 4:52:12 PM	WHS test

To view the details of a customer order, follow these steps:

1. If the customer orders you want to view are not listed, filter the list. See [“Filter the Customer Order Management List.”](#)
2. To change the filtering of the orders listed in the Customer Order List window, follow these steps:

Figure 21–4 Customer Order Filter

Customer Order Filter

Date Filters

Release From Date:

Release To Date:

Additional Filters

SIM Customer Order ID:

Fulfillment Order ID:

Customer Order ID:

BIN ID:

Item: ...

Status: Active

Reservation Type: -All-

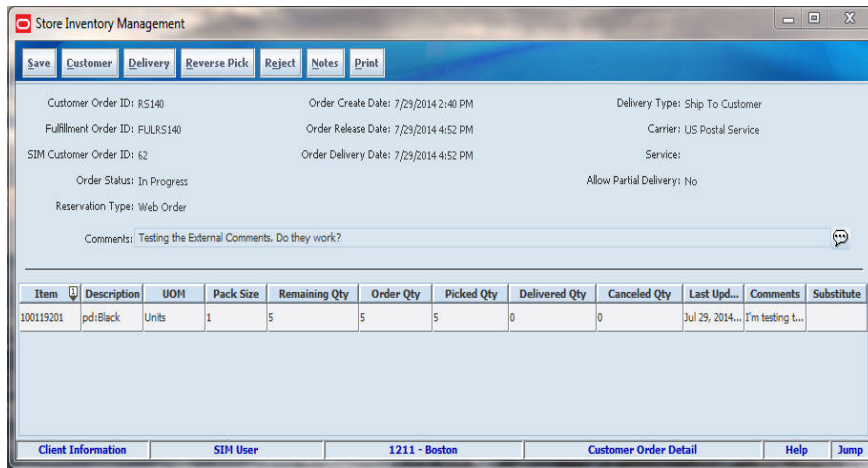
Customer Name:

Tracking ID:

- a. Enter or select search values to use to filter the list.
- b. Click **Apply**. The customer orders that match your search criteria are listed in the Customer Order List window.

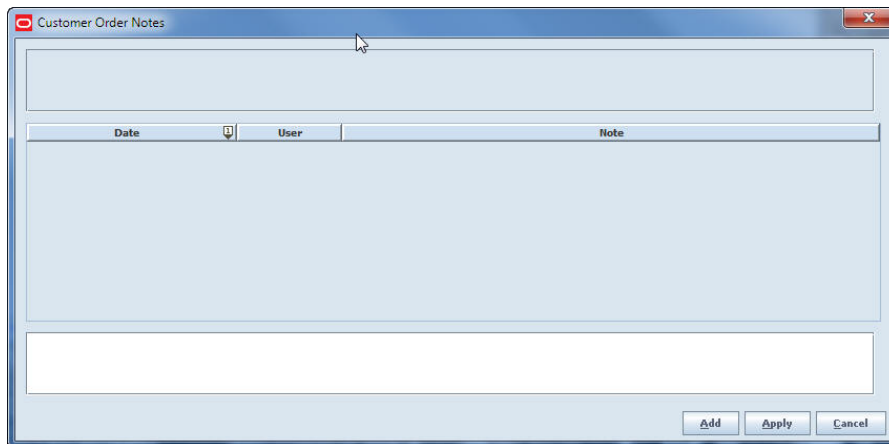
3. If a customer order you want to view is listed, double-click the customer order. The Customer Order Detail window opens.

Figure 21–5 Customer Order Detail Window



4. Click **Notes**. The Customer Order Notes window opens.

Figure 21–6 Customer Order Notes Window



- a. Click **Add** to apply more than one detail note about the customer order.
- b. Click **Apply** to save the changes and return to the Customer Order Detail window.
5. Click **Print** to print a report for the Customer Order Detail. The Report Selection window opens.
 - a. Select your printer.
 - b. Click **OK**. Your report prints and returns you to the Customer Order Detail window.
6. Click **Reject** to reject the order. The customer order is rejected.
7. Click **Customer**. The Customer Detail window opens.

Figure 21–7 Customer Detail Window

8. Click **Back** to return to the Customer Order Detail window.

Create a Customer Order Pick List

To create a customer order pick list, follow these steps:

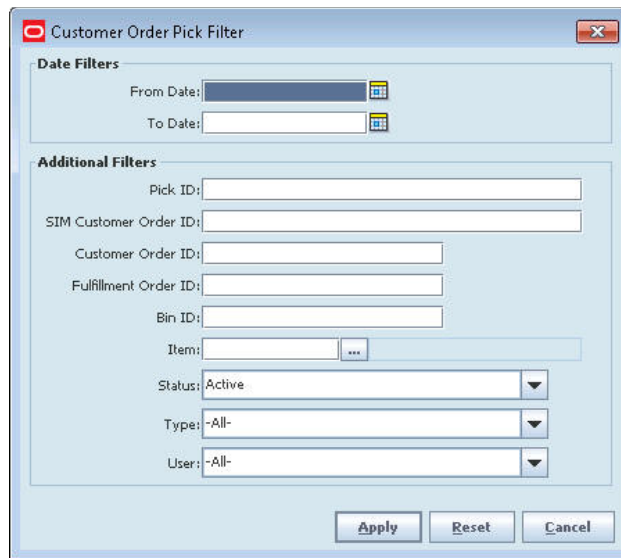
1. Click **Pick**. The Customer Order Pick List opens.

Figure 21–8 Customer Order Pick List Window

ID	Type	Create Date	Status	Pick Qty	Actual Qty	User
5261	Bin	Sep 27, 2013 3:3...	New	4		Helen
5244	Bin	Sep 5, 2013 10:4...	New	8		Sue
5243	Bin	Sep 5, 2013 10:4...	New	377		Sue
5241	Bin	Sep 5, 2013 10:0...	New	2		Sue
5201	Bin	Aug 19, 2013 6:...	New	11		orsimadmin
5161	Bin	Aug 15, 2013 12:...	New	9,7		orsimadmin
4981	Bin	Jul 3, 2013 7:39:...	New	9		orsimadmin
4902	Bin	Jul 2, 2013 10:47...	New	4		orsimadmin
4901	Bin	Jul 2, 2013 10:45...	New	10		orsimadmin
4842	Bin	Jun 28, 2013 5:0...	New	1000		orsimadmin
4781	SIM Customer ...	Jun 27, 2013 2:4...	New	1000		varsha
4742	SIM Customer ...	Jun 26, 2013 4:5...	New	1000		varsha
4741	SIM Customer ...	Jun 26, 2013 4:5...	New	10		varsha
4681	Bin	Jun 25, 2013 12:...	In Progress	13	1	varsha
4661	SIM Customer ...	Jun 24, 2013 6:2...	New	3		varsha
4681	SIM Customer ...	Jun 19, 2013 6:4...	In Progress	10	3	INTEGRATION

To change the filtering of the orders listed in the Customer Order Pick List window, follow these steps:

1. Click **Filter**. The Customer Order Pick Filter window opens.

Figure 21–9 Customer Order Pick Filter Window

2. Enter or select search values to use to filter the lists.
3. Click **Apply**. The customer orders that match your search criteria are listed in the Customer Order Pick List window.
4. Click **Back** to return to the Customer Order List window.

Delete a Customer Order Pick List

To delete a customer order pick list, follow these steps:

1. Select the customer order pick you want to delete.
2. Click **Delete**. A message is displayed: “Are you sure you want to delete the selected customer order picks?”
3. Click **Yes** to return to the Customer Order Pick List.

Print a Customer Order Pick List

To print a customer order pick list, follow these steps:

1. Select the customer order pick you want to print.
2. Click **Print**. In the Printer field, select the printer you want to use.
3. Click **OK**. A message informs you that the Customer Order Pick Report was printed. (See “[Print or View SIM Reports and Other Output](#)” in [Chapter 2](#) for general information about SIM report output.)
4. Click **OK**.

Create a Customer Order Pick List

To create a customer order pick list, follow these steps:

1. Click **Create** to create a customer order pick. The Customer Order Pick Create window opens.

Figure 21–10 Customer Order Pick Create Window

2. From the create pick dialog, select a **Pick Type** from the drop-down list. Choices include Bin and SIM Customer Order.
3. If Bin is selected, enter the **Bin Quantity**.
4. If SIM Customer Order is selected, select a **SIM Customer Order ID** from the drop-down list.
5. Click **Save** to save the pick and return to the Customer Order Pick List window.

Enter Pick Details

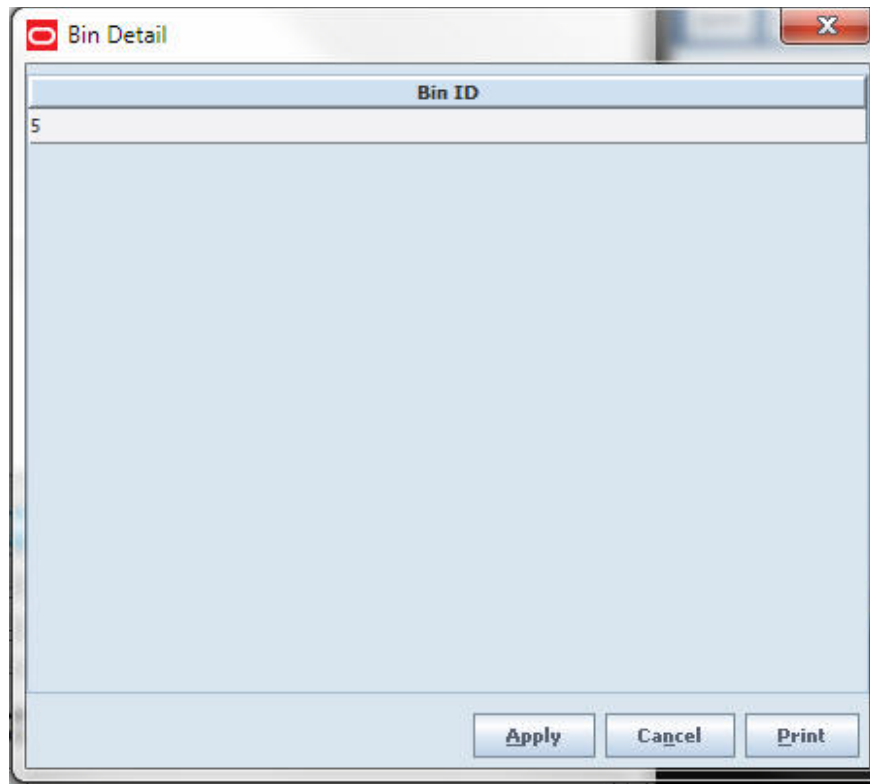
A bin can be associated with a customer order pick.

1. From the Customer Order Pick List window, double-click a customer order. The Customer Order Pick Detail window opens.

Figure 21–11 Customer Order Pick Detail Window

Item	Description	SIM Custo...	Bin ID	Fulfillment ID	UOM	Pack Size	Substitute	Adjusted Pick Qty	Pick Qty	Quantity
100119009	pd:Brown	41	5	FULRS1004	Units	1	No	0	1	

2. In the **Quantity** field, enter the quantity to be picked.
3. Click **Bins**. The Bin Detail popup window opens.

Figure 21–12 Bin Detail Window

4. Enter the bin identifier.
5. Click **Apply**. You are returned to the Customer Order Pick Detail window.
6. Click **Save** to save the changes and return to the Customer Order Pick List window.

Substitute an Item for Customer Order Pick

The Item Substitution window is used to add substitute items to the customer order. More than one item can be substituted for an item. In some cases, especially with fresh food, a retailer wants to give leeway to the shopper to substitute the items that have been ordered. Such as a specific brand of milk is out of stock, while the house brand is in stock.

1. Click **Item Substitution**. The Item Substitution popup window opens. All items listed fall under the same type as the item that is on the customer order.

Figure 21–13 Item Substitution Window

Item: 100637130 - Kenwood Kettle
 Pick Quantity: 100
 Total Actual Pick Quantity: 0
 Standard UOM: EA
 Suggested Qty: 100

...

Item	Description	Diff1	Diff2	Diff3	Diff4	UOM	Pack Size	Avail SOH	Actual Pick ...
100637130	Kenwood Kettle					Cases	100	16	0

Buttons: Add Item, Apply, Cancel

2. If Item Lookup is available, search for an item to select and then click **Add** to add the item to the pick.
3. Enter the substitution, such as UOM or quantities.
4. Click **Apply** to add the item to the Customer Order Pick Detail window with default the actual quantity to 1.

Confirm a Customer Order Pick

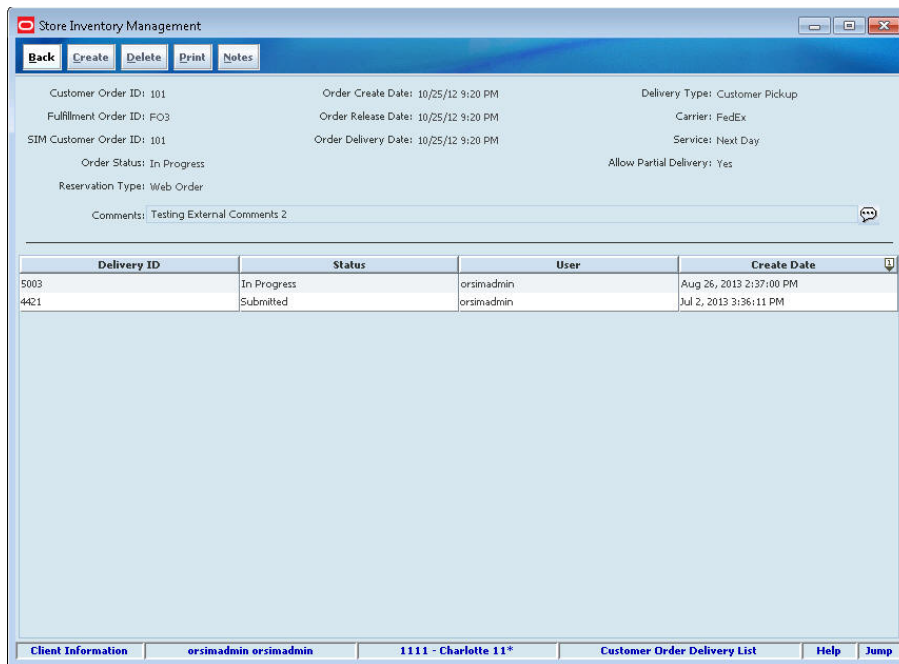
This button completes the pick detail and returns the user to the Customer Order Pick List window.

Create a Customer Order Delivery

To create a customer order delivery, perform the following steps:

1. Click **Delivery**. The Customer Order Delivery List opens.

Figure 21–14 Customer Order Delivery List Window



2. To delete a delivery, select the delivery you want to delete and click **Delete**.
3. To print an delivery, select the item and click **Print**.
4. Click **Notes** to add additional information to the customer order delivery.
5. Click **Create** to create a customer order delivery. The Customer Order Delivery Detail window opens.

Figure 21–15 Customer Order Delivery Detail – Create Window

The screenshot shows the 'Customer Order Delivery Detail – Create Window' in the Store Inventory Management application. The window title is 'Store Inventory Management'. At the top, there is a menu bar with buttons: Save, BOL, Dispatch, Default Quantities, Notes, Refresh, Scanner, Egt. Attributes, and Cancel. Below the menu bar, the main area contains a form with the following fields:

- Customer Order ID: 5T1024
- Order Create Date: 7/29/2014 11:25 AM
- Delivery ID: New
- Delivery Type: Ship To Customer
- Fulfillment Order ID: FULST1024
- Order Release Date: 7/29/2014 4:52 PM
- Delivery Status: In Progress
- Carrier: US Postal Service
- SIM Customer Order ID: 42
- Order Delivery Date: 7/29/2014 4:52 PM
- Delivery Create Date:
- Service:
- Order Status: In Progress
- Delivery Create User:
- Allow Partial Delivery: No
- Reservation Type: Web Order

Below the form is a 'Comments' field with the text 'Testing the External Comments. Do they work?' and a speech bubble icon. Underneath the comments is a table with the following columns: Item, Descripti..., UOM, Pack Size, Remaining Qty, Order Qty, Picked Qty, Delivered Qty, Canceled Qty, Quantity, UIN Qty, and Substitute. The table contains one row of data:

Item	Descripti...	UOM	Pack Size	Remaining Qty	Order Qty	Picked Qty	Delivered Qty	Canceled Qty	Quantity	UIN Qty	Substitute
4567891234...	Sue GS1 Ite...	Units	1	1100	1100	1100	0	0			

At the bottom of the window is a navigation bar with buttons: Client Information, SIM User, 1111 - Charlotte *, Customer Order Delivery Detail, Help, and Jump.

- a. Update bill of lading (BOL) information:
 - a. Click BOL. The BOL Detail window opens.

Figure 21–16 BOL Detail Window – Customer Order Delivery

The screenshot shows the 'BOL Detail Window' in the Store Inventory Management application. The window title is 'Store Inventory Management'. At the top, there is a menu bar with buttons: Save and Cancel. Below the menu bar, the main area contains a form with the following sections:

- Shipment Summary:** Delivery ID: 241, Create Date: 8/26/2015, Bill Of Lading ID: 4851, Dispatch Date:
- Additional:** Notes: BOL, Requested Pickup Date:
- Ship From:** 3411 - Seattle, 3313 Hacking Blvd LB, Seattle, WA 98143
- Ship To:** 1411 - Delivery First Name Delivery Last Name, Delivery Address 1, Delivery Address 2, Delivery City, WA Delivery Postal Code
- Carrier:** Type: Receiver, Sender, Third Party; Carrier: DHL, FedEx, Other
- Service:** Other
- Carrier Address:** Name:
- Container:** Package Type: Select, Weight (KG):, Tracking ID:

At the bottom of the window is a navigation bar with buttons: Client Information, SIM USER, 1411 - Seattle, BOL Detail, Help, and Jump.

- b. Update the following fields as needed:
 - Address Type** – The primary mailing address is selected by default. If there are multiple addresses, select the address type to which you want to

ship the return. (You can also enter a different new address in the Alternate Destination Address field.)

Motive – The default value is Customer Order Delivery. If needed, select a different value.

Tax ID – If this field is blank, enter the tax ID for the supplier.

Carrier – Select the type of Carrier. Select other pertaining information if necessary, including Service.

Weight – Weight of package if required per the service.

Package Type – Select the type of package for the shipment.

Alternate Destination Address – If the return is to be shipped to an address that you cannot select (Address Type under Ship To), enter the full shipping address to which the return will be shipped.

Requested Pickup Date – Enter or select the date when you want the return picked up.

Tracking ID – Enter a tracking ID number.

- c. Click **Save**.

Note: Depending on the deployment of SIM and backend applications, it is possible for the tracking ID field will be filled in automatically by a Manifest system when submitting or dispatching. Check the *Oracle Retail Store Inventory Management Implementation Guide vol 2 - Integration with Oracle Retail Applications* for more information.

- b. Click **Default Quantities** to apply the default quantities to the customer order delivery.
- c. Click **Notes** to add additional detail to the customer order delivery.
- d. Click **Refresh** to return the fields back to the original information.
- e. Click **Scanner** to scan the item. See “[Scan an Item \(Scanner Button\)](#)” in [Chapter 2](#) for more information.
- f. To update the Extended Attributes, select a row and click **Ext. Attributes**. The Extended Attributes window opens. This window captures additional information about an item.

Figure 21–17 Extended Attributes Entry Window

Batch/Lot	Best Before	Origin	Sell By	Use By	Scan Qty
11110					2
458					2

Extended Attributes

Batch/Lot:

Best Before:

Origin:

Sell By:

Use By:

Apply Add Attributes Remove Attributes Cancel

Note: The Extended Attributes Entry window view may vary, depending upon customer chosen attributes.

- Enter/select the field options.
- Click **Add Attributes** to add the additional attributes to the item.
- Click **Apply** to save the changes and return to the previous window.

- g. Enter **Quantity** for delivery.
- h. Enter **UIN Qty** for UIN items.
- i. Click **Save** to save the information that you entered so that you can create a customer order delivery at a later date. You are returned to the Customer Order Delivery List window.
- j. Click **Submit** to complete the customer order delivery. You are returned to the Customer Order Delivery List window.

Note: You can dispatch an item immediately or save it to be dispatched later.

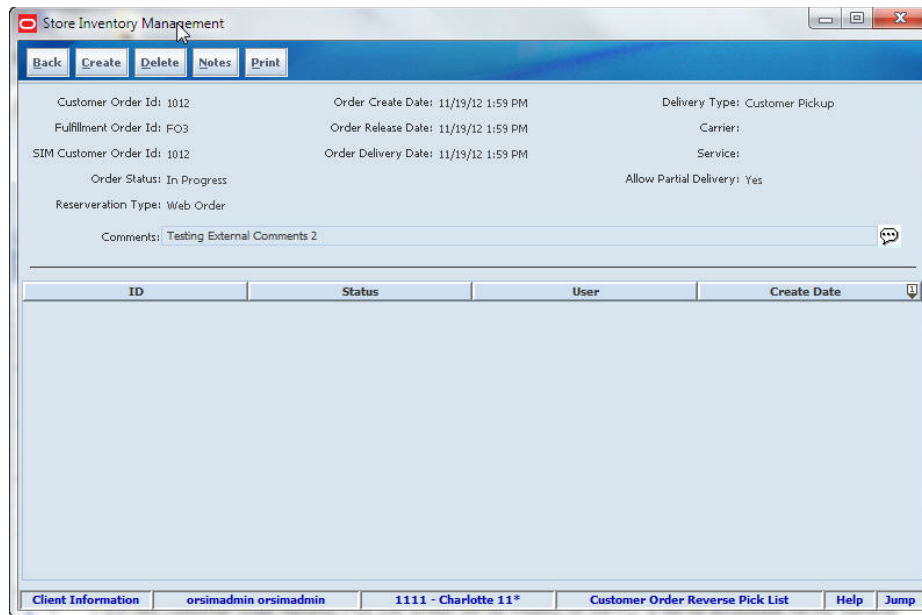
- k. Click **Cancel** to return to the Customer Order Delivery List window without saving changes.

Create a Reverse Pick

To create a reverse pick, perform the following steps:

1. Click **Reverse Pick**. The Customer Order Reverse Pick List window opens.

Figure 21–18 Customer Order Reverse Pick List Window



2. To delete a reverse pick, select the reverse pick you want to delete and click **Delete**.
3. To print an reverse pick, select the reverse pick and click **Print**.
4. Click **Notes** to add additional information to the reverse pick.
5. Click **Back** to return to the Customer Order Detail window.
6. Click **Save** to return to the Customer Order List window.
7. Click **Create** to create a customer order reverse pick. The Customer Order Reverse Pick Detail window opens.

Figure 21–19 Customer Order Reverse Pick List Detail Window

Store Inventory Management

Save Confirm **Default Quantities** Notes Scanner Cancel

Customer Order ID: 101 Order Create Date: 10/25/12 9:20 PM Reverse Pick ID: New Delivery Type: Customer Pickup
 Fulfillment Order ID: FO3 Order Release Date: 10/25/12 9:20 PM Reverse Pick Status: New Carrier: FedEx
 SIM Customer Order ID: 101 Order Delivery Date: 10/25/12 9:20 PM Reverse Pick Create Date: 10/6/13 2:19 PM Service: Next Day
 Order Status: In Progress Reverse Pick Create User: orsadmin Allow Partial Delivery: Yes
 Reservation Type: Web Order

Comments: Testing External Comments 2

Item	Description	UOM	Pack Size	Remaining...	Order Qty	Picked Qty	Delivered ...	Canceled ...	Sugg. Rev...	Quantity	Substitute
100147020	Item3:Green:...	Units	1	8	10	8	1	1	0		

Client Information orsadmin orsadmin 1111 - Charlotte 11* Customer Order Reverse Pick Detail Help Jump

- a. Click **Default Quantities** to apply the default quantities to the customer order reverse pick.
- b. Click **Notes** to add additional detail to the customer order reverse pick.
- c. Click **Scanner** to scan the item. See “[Scan an Item \(Scanner Button\)](#)” in [Chapter 2](#) for more information.
- d. Enter quantities of the reverse picked item.
- e. Click **Save** to save the information that you entered so that you can create a customer order reverse pick at a later date. You are returned to the Customer Order Reverse Delivery List window.
- f. Click **Confirm** to complete the customer order delivery. You are returned to the Customer Order Reverse Delivery List window.
- g. Click **Cancel** to return to the Customer Oder Reverse Delivery List window without saving changes.

