

Oracle® Retail Merchandising Foundation Cloud Service

Purchase Orders and Contracts User Guide



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Oracle Retail Merchandising Foundation Cloud Service Purchase Orders and Contracts User Guide, Release 23.1.401.0

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Preface

This document describes the Oracle Retail Merchandising user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

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This document is for users and administrators of Oracle Retail Merchandising. This includes merchandisers, buyers, business analysts, and administrative personnel.

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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.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Overview

This guide discusses purchase orders and contracts in the Retail Merchandising.

Purchase Orders

Purchase Ordering functions control procurement of stock for retail.

Purchase orders in Merchandising provide support for capture and view of several ordering related attributes such as shipping information, import attributes, Harmonized Tariff Schedule (HTS), expenses, letter of credit information, and partner information. Inventory Management parameters such as scaling, truck splitting, supplier minimum, and rounding percentages may also be defined and enforced at the order level.

Purchase Orders can be created through automated or manual processes. Automated orders are largely generated by the replenishment processes. Manual Orders may be raised for ad-hoc purchases against contracts and from replenishment generated Buyer Worksheets.

The ordering screens also provide usability enhancers such as diff distribution and pack templates to ease the process of order creation.

Purchase order receipts (Shipments) record the increment to on-hand when goods are received from a supplier. Weighted average cost (WAC) is recalculated at time of receipt using the PO landed cost. Transaction audit records are created for financial audit, and the receiver is made available for invoice matching. Open to Buy limits are discussed as a precursor to order creation.

Automatically Generated Purchase Orders

Purchase orders may be automatically generated through several ways:

- **Replenishment:** When inventory levels reach a point determined by the replenishment method assigned to an item, a purchase order can be created in Worksheet or Approved status.
- **Investment Buying:** When the investment buy calculations indicate a benefit to the company by purchasing additional inventory, a purchase order can be created in Worksheet or Approved status.
- **Vendor managed inventory (VMI):** If your supplier uses a VMI system, the supplier can create purchase orders in Worksheet or Approved status.
- **Truck splitting:** When a purchase order is split into two purchase orders to accommodate truck splitting, a purchase order can be created in Worksheet status.
- **Warehouse Stocked/Cross Dock Docked Stock:** Accumulates store need at the item/ location level. If the need cannot be fulfilled by the warehouse, a worksheet PO is created.

Manually Creating a Purchase Order

In addition to auto generation, purchase orders can also be created manually in Merchandising. After creating the purchase order and specifying the header details, you would then need to add one or more items to the purchase order and distribute those items to one or more locations.

You can create the following purchase orders in Merchandising.

- Order/Import Order
- Contract Order
- Order for Contracted Items
- DSD Order
- Pre-issued Order
- Purchase Order for a Pack
- Customer Order

2

Create a Purchase Order

The creation of a purchase order starts with the Create Order page. You can open the Create Order page in two different ways.

- From the Tasks menu, select **Orders > Manage Orders > Actions > Create**. The Create Order page opens.
- From the Tasks menu, select **Orders > Create Order**. The Create Order page opens.

To create a purchase order follow the steps below.

1. Figure 2-1 Create Order Page

The screenshot shows a 'Create Order' dialog box with the following fields and controls:

- * Supplier Site**: A text input field with a dropdown arrow.
- * Order Type**: A dropdown menu showing 'N/B'.
- Not Before Date**: A text input field with a calendar icon.
- Not After Date**: A text input field with a calendar icon.
- Single Location Order**: A checkbox that is checked.
- * Location**: A text input field with a dropdown arrow.
- Import Country**: A dropdown menu showing 'US'.
- Department**: A text input field with a dropdown arrow.
- OK** and **Cancel** buttons at the bottom right.

2. In the **Supplier Site** field, enter, select or search for the desired supplier site. This field is required to create a purchase order.
3. In the **Order Type** field, enter or select an order type from the list. This field is required to create a purchase order. Possible order types are:
 - ARB - Automatic replenishment of basic goods
 - BRB - Buyer replenishment of basic goods
 - Customer Order - For more information about how to create a customer order, see the [Create a Customer Order](#) section.
 - N/B - Order of non-basic goods
4. In the **Not Before Date** field, enter the date before which the order deliveries are not expected, or use the Calendar icon to select a date.
5. In the **Not After Date** field, enter the date after which the order deliveries are not accepted, or use the Calendar icon to select a date.

6. Check the **Single Location Order** check box, if the items on the purchase order are distributed to only one location.
7. In the **Location** field, select the location type from the drop down list, for example, Store or Warehouse. Then the location list is enabled. Enter, select or search for the corresponding location.

 Note:

The **Location** field is only shown, if you check the **Single Location Order** check box.

If you select the **Single Location Order** check box, a location is required to create a purchase order.

8. In the **Import Country** field, enter, select or search for the import country.

 Note:

When you create an import order, make sure all locations on the order exist within the import country.

9. In the **Department** field, enter, select or search for the department.
10. After you have entered all the information for the order, you have the following options.
 - Click **OK** to create the purchase order and close page. The Order page opens in a new tab. For more information about the order page, see the [Define/Enter a Purchase Order](#) section.
 - Click **Cancel** to reject all entries and close the page.

Define/Enter a Purchase Order

The Order page allows you to edit and view purchase orders. You can select special characteristics for a purchase order. Depending on which characteristics you select, you may be prompted to enter additional information.

Some of the special characteristics may be:

- If you create an import order and pay by letter of credit, you must provide additional information for the letter of credit.
- If you create an order for a prepack, you must provide the details for the prepack.
- If you create a purchase order for a customer, you must provide customer details.

The Order page is called either through creating an order, or through the order search, for more information about how to create an order, see the [Create a Purchase Order](#) chapter, and for more information on the order search refer to the [Manage Purchase Orders](#) chapter.

Figure 2-2 Order Page

Order Page

Import Order 1490211

Total Order Cost: 100.0000 | Approved

Supplier Site: 131362287 | David Avenue SFO supplier site

Country Of Sourcing: IN

Location: 1111 | LA Store

Currency: USD

Order Exchange Rate: 1.0000 vs USD

Terms: Term 4 | Net 30 Days

Pay Method: [Dropdown]

Invoice Location: [Dropdown]

Vendor Order: [Text Field]

EDI: ☐

Pre Mark: ☐

QC Required: ☒

Not Before Date: 1/30/2023

Not After Date: 1/30/2023

OTB End of Week Date: 2/4/23

Order Type: NIS

Origin: Manually Created

Order Context: [Dropdown]

Buyer: [Dropdown]

Order by Prepack: ☐

Include On Order: ☒

Promotion: [Dropdown]

Master Order: [Text Field]

Shipping Information

Partners

Details | Worksheet | More Actions | Save | Save and Close | Cancel

Order or Import Order

The Order or Import Order section contains the following fields.

Table 2-1 Order or Import Order Section Fields and Description

Field	Description
Order/Import Order	The Order/Import Order field contains the order number by default.
Store Review Status	This field is displayed only for Semi-Automatic replenishment generated Orders that require store review of the replenishment quantities. Displays the status of Store Review which can be Pending, Completed or Expired.
Total Order Cost	The Total Order costs are only displayed when items have been added to the order. If you hover over the Total Order Cost amount, the Totals hover page is displayed. For more information about this page see Table 2-2 .
Recalculate Totals Icon	Use the Recalculate Totals icon to recalculate the total amounts.
Revisions Exist	The Revisions Exist text is only shown, if revisions are available for the order.
Order Status	The Order Status is displayed as text. Upon order creation, the purchase order is in Worksheet status.
Supplier Site	This field displays the supplier site. The supplier site can only be selected in the Create Order page. Once you have selected the supplier site in the Create Order page, you can no longer change this entry.
Country of Sourcing	Enter or select the country from which the items are sourced.
Location	This field displays the location, when the order is a single location order. The location can only be selected in the Create Order page. Once you have selected the location in the Create Order page, you can no longer change the entry.

Table 2-1 (Cont.) Order or Import Order Section Fields and Description

Field	Description
Department	This field displays the department. A department entered at this level signifies the order is a single department order. The department can only be selected in the Create Order page. Once you have selected the Department in the Create Order page, you can no longer change the entry.
Currency	Enter, select or search for a currency for the order from the list. The Currency field is a required field.
Exchange Rate	This field shows the exchange rate conversion between the Order currency and the currency of locations on the Order. You can update the Exchange Rate when the Order currency differs from the currency of the locations on the Order. If you click the Edit Exchange Rate icon, the Edit Exchange Rate page opens. For more details, see the Editing an Exchange Rate section.
Terms	Enter, select or search for the payment terms, for example, Net 30 Days.
Pay Method	Select the payment method, for example, Wire Transfer or Letter of Credit.
Invoice Location	The store or warehouse where the invoice is issued. This field is only enabled for import purchase orders.
Vendor Order	Enter the Vendor Order number.
EDI	Select the EDI check box, if the data exchange between retailer and supplier are done via electronic data interchange.
Pre Mark	Select the Pre Mark check box, if the supplier has agreed to break orders into separately marked boxes that can be shipped directly to stores.
QC Required	Select the QC Required check box, if quality control is required for shipments.
Not Before Date	Enter the date before which the order deliveries are not expected, or click the Calendar button to select the date.
Not After Date	Enter the date after which the order deliveries are not accepted, or click the Calendar button to select the date.
OTB End of Week Date	Enter the open to buy end of week date or click the Calendar to select the date.
Order Type	Select the Order Type from the list. Possible order types are: • ARB - Automatic replenishment of basic goods • BRB - Buyer replenishment of basic goods • Customer Order • N/B - Order of non-basic goods If you have created a customer order, this field is defaulted to order type Customer Order and can not be changed. For more information about how to create a Customer Order, see the Create a Customer Order section. The Order Type field is a required field.
Origin	This field shows where the order originated. For example, Buyer Worksheet.
Order Context	Enter, select or search for the Order Context from the list.

Table 2-1 (Cont.) Order or Import Order Section Fields and Description

Field	Description
Buyer	Enter, select or search for a buyer from the list.
Order by Prepack	Select the Prepack check box, to enable pack creation for the purchase order.
Include On Order	This field determines, if the order's quantities should be included in On Order calculations.
Promotion	Enter, select or search for the promotion you want to add to the purchase order.
Contract	The Contract field displays the contract number associated to the purchase order, if any.
Franchise Order	The Franchise Order field displays the franchise order number.
Master Order	Enter the master order number.

The Totals Hover page shows the cost break up.

Figure 2-3 Totals Hover Page

		Total Order Cost 190.0000	
	CAD	USD	
Total Order Cost	190.0000	164.16	
Expenses	190.0001	164.16	
Duty	0.0000	0.00	
Landed Cost	380.0001	328.32	
Outstanding Cost	190.0000	164.16	
Cancelled Cost	0.0000	0.00	
Discount % Off	0.0000	0.0000	
Backhaul Allowance			
Markup % Retail (Excl. VAT)	-89.98	-89.98	
Total Retail (Excl. VAT)	200.02	172.82	
Total VAT	20.0020	17.28	
Total Retail (Incl. VAT)	220.02	190.10	

The Totals hover page contains the following fields.

Table 2-2 Totals Hover Page Fields and Description

Fields	Description
Total Order Cost	This field shows the total cost of the order.
Expenses	This field shows the value of the expenses occurred for this order.

Table 2-2 (Cont.) Totals Hover Page Fields and Description

Fields	Description
Duty	This field shows the duties, taxes, and fees the retailer must pay to import the goods on this purchase order.
Landed Cost	This field shows the sum of the cost, duty, and expenses for the shipments of the purchase order.
Outstanding Cost	This field shows the amount that is still open for this order.
Cancelled Cost	This field shows the value of any cancelled merchandise on the order.
Discount % Off	This field shows the price reduction in %.
Backhaul Allowance	The Backhaul Allowance is only displayed when you select the purchase type backhaul in the Shipping Information section.
Markup % Retail	This field shows the markup in %. When the retailer uses Simple VAT or Global Tax, this value excludes VAT.
Total Retail	This field shows the total retail value of all items on the purchase order, excluding the VAT amount. When the retailer uses Simple VAT or Global Tax, this value excludes VAT.
Total VAT	This field shows the total VAT of the purchase order. This field only displays, if the retailer uses Simple VAT or Global Tax.
Total Retail (Incl. VAT)	This field shows the total retail value of all items on the purchase order, including the VAT amount. This field only displays, if the retailer uses Simple VAT or Global Tax.

If the order currency is different from the system's primary currency, the totals will be displayed in both currencies, otherwise only the order currency is shown.

Shipping Information

The Shipping Information section contains the following fields.

Table 2-3 Shipping Information Section fields and Description

Field	Description
Purchase Type	Select the purchase type, such as Free on Board or Backhaul.
Pickup Date	Enter the pick up date or click the Calendar button to select a date.
Backhaul Allowance	The Backhaul Allowance field is only displayed, if the purchase type is Backhaul, otherwise the field is not available. - In the Backhaul Allowance field, select the Backhaul Allowance type. - If you select the Backhaul Allowance type Flat Fee, the input field next to the type is enabled. Enter the corresponding fee in the input field.
Pickup Location	The Pickup Location field is only available, if the purchase type is Pickup. Enter the pickup location.

Table 2-3 (Cont.) Shipping Information Section fields and Description

Field	Description
Pickup No.	The Pickup No. field is only available, if the purchase type is Pickup. Enter the pickup number.
Freight Terms	Enter, select or search for the freight terms. For example, select 2% of Total Cost.
Freight Payment Method	Select the freight payment method. For example, select Prepaid Only.
Freight Contract	Enter the freight contract number.
Transportation Responsibility	The transportation responsibility refers to the location point where the buyer becomes responsible for transportation related costs. - In the Transportation Responsibility field, select the Transportation Responsibility type. For example, select City and State. Then the Transportation Responsibility location field is enabled. - Enter the Transportation Responsibility location.
Title Pass Location	The title pass location, refers to the location where the ownership of the goods changes from the seller to the buyer of the goods. - In the Title Pass Location field, select the Title Pass Location type. Then the Title Pass Location field is enabled. - Enter the Title Pass Location.
Import Country	Enter, select or search for the import country of the goods.
Shipment Method	Select the shipment method. For example, select Rail Container.
Earliest Ship Date	Enter the earliest ship date or click the Calendar button to select a date.
Latest Ship Date	Enter the latest ship date or click the Calendar button to select a date.
Appointment Date/Time	Enter the appointment date or click the Calendar button to select a date.
Estimated In Stock Date	Enter a date or click the Calendar button to select an estimated date.
Lading Port	The port where goods are loaded onto the vessel. Enter, select or search for the lading port of the goods.
Discharge Port	The location where the goods are unloaded from the shipment vessel. Enter, select or search for the discharge port of the goods.
Clearing Zone	The field Clearing Zone is available only if the import country has one or more clearing zones outside a location. Enter or select the clearing zone.

Partners

In the Partners section you can enter additional partner information. This section contains the following fields. For more information, see [Partners](#) in the *Oracle Retail Merchandising Data User Guide*.

Table 2-4 Partners Section Fields and Description

Field	Description
Factory	Enter, select or search for the factory information.
Agent	Enter, select or search for the agent information.
Routing Location	Enter, select or search for the routing location.
Partner 1 - 3	These fields can contain up to three partners, that can be associated with the order. Any type of partner can be added in these fields, such as consolidator, freight forwarder, or if desired additional factories or agents. • In the Partner Type field, select the corresponding partner type, for example, Agent. Then the partner list is enabled. • Enter, select or search for the corresponding partner.

Comments

The Comments section holds the comments field. You can enter any comments for the purchase order.

Order - More Actions Menu

Use the More Actions menu to navigate to the following pages. The More Actions menu contains the following options.

Table 2-5 More Actions Menu - Buttons and Description

Action Buttons	Description
More Actions	You can navigate to the following pages by using the More Actions menu. • Customer The Customer option is available only if you have created a customer order. The menu item Customer opens the Customer Details page. For more information about how to view, add or edit customer details of a purchase order, see the Customer Details section. • Order Dates Opens the Order Dates page, displaying the written, original approval and, if available, the closed date of the current purchase order. • Supplier Details Opens the Supplier Site page, displaying supplier information such as the supplier's address. • Order Revisions Opens the Order Revisions page. • Appointments Opens the Appointments page.

Table 2-5 (Cont.) More Actions Menu - Buttons and Description

Action Buttons	Description
	• Order Shipments Opens the Shipment List page.
	• Required Documents Opens the Required Documents page.
	• Order Detail Report Displays the Order Detail report in a new tab.
	• Timelines Opens the Timeline page. For more information about Timelines, see the Import Management chapter, section "Timelines".
	• Work Orders for Purchase Orders The menu item Work Orders opens a submenu. Select Create to create a new work order for the current purchase order. Select Manage to edit an existing work order for the current purchase order.
	• Letter of Credit Opens the Order Letter of Credit page.
	• Recalculate Order Totals Opens the Order Recalculation page.
	• Inventory Management Opens the Inventory Management page.
	• Deal Summary Opens the Deal Summary page.
	• Order Detail Report The Order Details Report button displays the Order Detail report in a new tab.

Editing an Exchange Rate

The Edit Exchange Rate page allows you to view and maintain exchange rates for a selected currency. The exchange rates are used to convert monetary amounts from the Order Currency to the currency of the Locations on the Order. You can only edit the exchange rate when the order's currency is different from that of the Locations on the Order.

To edit the displayed exchange rate, follow the steps listed below.

1. Click the Edit Exchange Rate icon .
2. The Edit Exchange Rate page opens.

Figure 2-4 Edit Exchange Rate Page

Enter Rate or Select from the List

Exchange Rate vs USD

Type	Effective Date	Exchange Rate
Operational	6/2/2019	0.0225
Purchase Order	6/2/2019	0.0315

OK Cancel

3. In the **Exchange Rate** field, enter the exchange rate manually or select a record in the Exchange Rate table.

Note:

The Exchange Rate table lists the following exchange rates - Purchase Order, consolidation or operational. The consolidation exchange rate is only shown, if enabled.

4. After you have entered or selected the exchange rate, choose one of the following options.
 - Click **OK**. The system overwrites the value in the Purchase Order page.
 - Click **Cancel** to reject your entries and close the page.

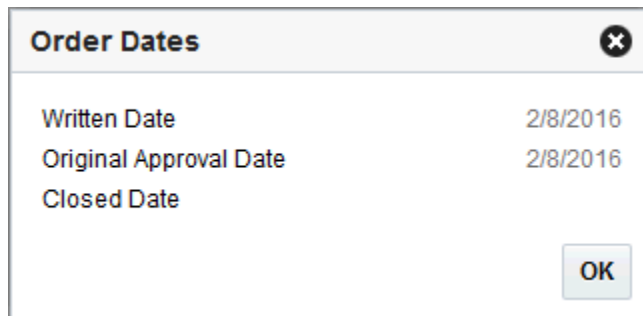
Order Dates

The Order Dates page displays important order dates such as when the order has been created (Written Date), when the order is originally approved (Original Approval Date) as well as the Closed date.

To view the order dates of a purchase order follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link, or mark a record and select **Actions > Edit/View**. The Order page opens.
5. In the Toolbar select **More Actions > Order Dates**. The Order Dates page opens. The order dates are displayed.

Figure 2-5 Order Dates Page



Written Date	2/8/2016
Original Approval Date	2/8/2016
Closed Date	

OK

6. Click **OK**, to exit the Order Dates page.

Supplier Details

The Supplier Site page, displays supplier site details, including the name, address and currency.

To view the supplier site details follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search Page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link, or mark a record and select **Actions > Edit/View**, or use the corresponding icons. The Order page opens.
5. In the Toolbar select **More Actions > Supplier Details**. The Supplier Site page opens. The supplier site details are displayed.

Figure 2-6 Supplier Site Page

Supplier Site	
SS International - Fashion	
12345 Strawberry St.	
City	Mango City
State	MN
Postal code	
Country	US
Currency	USD
OK	

6. Click **OK** to close the Supplier Site page.

Required Documents

The Required Documents function allows you to add or delete required documents, for example, to a selected purchase order.

Adding Required Documents to a Purchase Order

To add a required document to a purchase order follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Order page opens.
5. In the Toolbar, select **More Actions > Required Documents**. The Required Documents page opens.

Figure 2-7 Required Documents Page

6. Select **Actions** > **Add** or use the Add icon . The Add Document page opens.

Figure 2-8 Add Document Page

- a. In the **Document** field, enter, select or search for the document type you want to add to the purchase order.
- b. The **Text** field populates automatically.
- c. After you have selected the desired document, you have the following options.
 - Click **OK** to add the document to the table and exit the Add Document page.
 - Click **OK and Add Another** to add the current document to the table and stay in the Add Document page to add further documents.
 - Click **Cancel** to reject the selected document and exit the Add Document page.
7. After you have added all the desired documents to the table, you have the following options.
 - Click **Save** to save the document changes for the purchase order and remain in the Required Documents page.
 - Click **Save and Close** to save the document changes for the purchase order and exit the Required Documents page.

- Click **Cancel** to reject all the document changes for the purchase order and exit the Required Document page.

Deleting Required Documents from a Purchase Order

To delete a required document to a purchase order follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Order page opens.
5. In the Toolbar, select **More Actions > Required Documents**. The Required Documents page opens.
6. In the table select the document you want to delete. The selected record is marked blue.
7. Select **Actions > Delete** or use the Delete icon.
8. You are prompted to confirm that you want to delete the selected document.
 - Click **Yes** to delete the selected document. The document is deleted from the table.
 - Click **No** to keep the selected document. The document is still shown in the table.
9. After you have deleted all desired documents from the table, you have the following options.
 - Click **Save** to save the document changes for the purchase order and remain in the Required Documents page.
 - Click **Save and Close** to save the document changes for the purchase order and exit the Required Documents page.
 - Click **Cancel** to reject all the document changes for the purchase order and exit the Required Document page.

Viewing Required Documents of a Purchase Order

To view required documents of a purchase order follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Results section, select a record.
5. Next select **Actions > View**. The Order page opens.

6. In the Toolbar, select **More Actions > Required Documents**. The Required Documents page opens. The documents for the selected purchase order are displayed.
7. Click **Done** to exit the Required Document page.

Letter of Credit

The Order Letter of Credit page allows you to maintain letter of credit information for a purchase order. You must enter letter of credit information, when you select Letter of Credit as the method of payment on a purchase order.



Note:

The Letter of Credit function is only available, if you selected Letter of Credit as the method of payment.

To add Letter of Credit information to a purchase order follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Order page opens.
5. In the Toolbar, select **More Actions > Letter of Credit**. The Order Letter of Credit page opens.

Figure 2-9 Order Letter of Credit Page

6. In the **Order No.** field the order number is shown at the top of the page.
7. In the **Applicant** field, enter, select or search for the applicant.

8. In the **Beneficiary** field, enter, select or search for the beneficiary.
9. In the **Letter of Credit** field, enter, select or search for the letter of credit reference.
10. The **Bank Letter of Credit** field populates automatically.
11. In the **Letter of Credit Group** field, enter the letter of credit group.
12. In the **Merchandise Description**, enter a description of the goods.
13. If necessary select the following check boxes:
 - Attached to Letter of Credit
 - Transshipment
 - Partial Shipment
14. Click the **Letter of Credit** button to navigate to the Letter of Credit head page. For more information about Letter of Credit, see the Import Management chapter, section "Letter of Credit Window".
15. After you have entered all Letter of Credit information, you have the following options.
 - Click **Save** to save the entered Letter of Credit information for the purchase order and stay in the Order Letter of Credit page.
 - Click **Save and Close** to save the entered Letter of Credit information for the purchase order and exit the Order Letter of Credit page.
 - Click **Cancel** to reject all Letter of Credit entries and exit the Order Letter of Credit page.

Viewing Letter of Credit Information

To view letter of credit information follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Search for and retrieve a purchase order. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The search results are shown in the Results section.
4. In the Results section, select a record.
5. Next select **Actions > View**. The Order page opens.
6. In the Toolbar, select **More Actions > Letter of Credit**. The Order Letter of Credit page opens. The Letter of Credit information for the selected purchase order is displayed.
7. Click the **Letter of Credit** button to navigate to the Letter of Credit page. For more information about Letter of Credit, see the Import Management chapter, section "Letter of Credit Window".
8. Click **Done** to close the Order Letter of Credit page.

Ordering Prepacks

To create a purchase order for a pack item follow the steps below.

1. From the Tasks menu, select **Orders > Create Order**. The Create Order page opens.

Figure 2-10 Create Order Page

2. In the **Supplier Site** field, enter, select or search the desired supplier site. This field is required to create a purchase order.
3. In the **Order Type** field, select an order type from the list. This field is required to create a purchase order. Possible order types are:
 - ARB - Automatic replenishment of basic goods
 - BRB - Buyer replenishment of basic goods
 - Customer Order - For more information about how to create a customer order, see the [Create a Customer Order](#) section.
 - N/B - Order of non-basic goods
4. In the **Not Before Date** field, enter or use the Calendar icon to select the date before which the order deliveries are not expected.
5. In the **Not After Date** field, enter or use the Calendar icon to select the date after which the order deliveries are not accepted.
6. Select the **Single Location Order** check box, if the items on the purchase order are to be distributed to only one location.
7. In the **Location** field, select the location type from the drop down list, for example, Store or Warehouse. Then the location list is enabled. Select or search for the corresponding location.

Note:

The Location field is shown only if you have selected the Single Location Order check box.

8. In the **Import Country** field, enter, select or search for the import country.

 Note:

When creating an import order, make sure that the import country and the import location are the same.

9. In the **Department** field, enter, select or search for the department.
10. After you have entered all the information for the order, you have the following options.
 - Click **OK** to create the purchase order and close the Create Order page. The Order page opens in a new tab. Refer to step 11 to complete the purchase order.
 - Click **Cancel** to reject all entries and close the Create Order page.
11. In the Order page enter or edit the enabled fields, as necessary. For more information see the [Define/Enter a Purchase Order](#) section.
12. In the Order Head section, you need to select the **Order by Prepack** check box to create an order for a pack item.

 Note:

To immediately add a prepack to the purchase order, click **Details**. The Order Distribution page opens. For more details about how to add a prepack to a PO, see the [Adding a Prepack to the Purchase Order](#) section, step 5.

13. To complete the order for a pack item, choose one of the following options.
 - Click **Save** to save the created purchase order for a pack item.
 - Click **Save and Close** to save the created purchase order for a pack item and close the Order page.
 - Click **Cancel** to reject all entries and close the Order page.

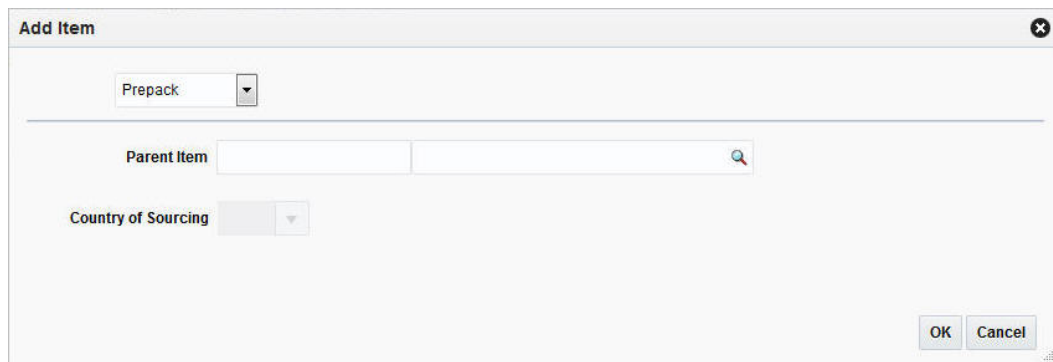
Adding a Prepack to the Purchase Order

To add a prepack to a purchase order follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Order page opens.
5. In the Toolbar, click **Details** to open the Order Distribution page.

6. Select **Actions > Add** or use the Add icon  to add a prepack to the purchase order. The Add Item page opens.

Figure 2-11 Add Item Page



- a. In the **Item Type** field select Prepack.

 Note:

The Prepack Item Type is only available, if you selected the **Order by Prepack** check box in the Order page. For more details about creating orders for pack items, see the [Ordering Prepacks](#) section.

- b. In the **Parent Item** field, enter or search for the parent item.
- c. In the **Country of Sourcing** field, enter, select or search for a country.
- d. To complete the process, choose one of the following options.
 - Click **OK** to add the prepack the purchase order and open the Prepack Creation page. For more details see the [Creating a Prepack Template](#) section.
 - Click **Cancel** to reject all entries and close the Add Item page.

Creating a Prepack Template

The Prepack Creation page allows you to create a pack for a purchase order. A prepack is a pack item that contains an assortment of diffs. You can add a diff, diff range, or diff template. You also enter a sequence number (for buyer packs) and the quantity that is to be distributed among the diff combinations.

You can create buyer packs or vendor packs. If you select buyer pack, you must indicate whether the pack is ordered and received as a pack or as eaches. If you select vendor pack, you must enter a unit cost for the pack. The unit cost for buyer packs is derived from the component items of the pack. The pack templates that you create here cannot be re-used for another purchase order.

In the Prepack Creation page enter the following information.

1. In the **Pack Type** field, select Buyer or Vendor.

2. If you select Buyer in the Pack Type field, select an option in the **Order As** and **Receive As** fields.
3. If you select Vendor in the Pack Type field, enter the cost per component unit in the **Unit Cost** field.
4. In the Differentiations section click **Actions > Add** or use the Add icon to add differentiators to the prepack template. The Add Differentiator page opens.
5. In the Differentiator fields, for example, flavor, enter, select or search for the diff you want to add.

 Note:

If the item parent is assigned to a Diff ID instead of a Diff Group, then these fields are populated with the diffs of the item parent. You cannot edit these diffs.

6. In the **Quantity** field, enter the quantity that you want to distribute among the diff combinations.
7. To complete the entry of the diff details, choose one of the following options.
 - Click **OK** to add the differentiator to the Differentiator section and close the Add Differentiator page.
 - Click **OK and Add Another** to add the differentiator to the Differentiator section and add additional diffs to the template.
 - Click **Cancel** to reject all entries and close the Add Differentiator page.
8. In the Prepack Creation page, click **Build Cost** to calculate the unit cost of the prepack.
9. Click **Save and Close**. A confirmation prompt is shown.
10. Confirm the prompt with **Yes** to create the diff combinations for the item parent. The Order Distribution page opens.
11. The Buyer or Vendor Pack is shown in the Order Distribution page.

Distributing the Prepack

In the Order Distribution page select a distribution method and enter the appropriate information in the page that opens.

- To distribute the prepacks by location, click **Location**. The Location Distribution page opens. For more details, see the [Distributing Items by Location](#) section.
- To distribute the items by store grade, click **Store Grade**. The Store Grade Distribution page opens. For more details, see the [Distributing Items by Store Grade](#) section.

Editing a Differentiator

In the Edit Differentiator page you can update the diffs, sequences and the quantity of each record in the Differentiator section.

To edit an existing differentiator in a prepack template follow the steps below.

In the Prepack Creation page enter the following information.

1. Select an entry in the Differentiator section.
2. Select **Actions > Edit** or use the Edit icon to update the selected differentiator. The Edit Differentiator page opens.
 - a. The **Differentiator** fields are populated with the diffs of the selected diff. Edit the fields, if necessary.

 Note:

All diffs that hold any value are disabled.

- b. In the **Quantity** field, edit the quantity.
 - c. Select the **Apply to All** check box, to apply the quantity or set the value of a possible missing diff to the records in the Differentiator table with the same diffs.

 Note:

If the differentiator you are trying to apply already exists, you receive a corresponding message.

- d. After all the necessary updates are made, choose one of the following options.
 - Click **OK** to update the selected differentiator in the table and close the Edit Differentiator page. The system returns to the Prepack Creation page
 - Click **Cancel** to reject all entries and close the Edit Differentiator page. The system returns to the Prepack Creation page.
3. In the Prepack Creation page, choose one of the following options.
 - Click **Save and Close** to save the updated prepack and return to the Order Details page.
 - Click **Cancel** to reject the prepack updates and return to the Order Details page.

Applying a Range

In the Apply Range page you can add the range, or apply the range for all records or to just the selected record in the Differentiator table.

To apply a range for a prepack template follow the steps below.

In the Prepack Creation page enter the following information.

1. Select an entry in the Differentiator section.
2. Select **Actions > Apply Range** or use the Apply Range button to add or update the differentiator of the selected record. The Apply Range page opens.

 Note:

If the differentiator you are trying to apply already exists, you receive a corresponding message.

- a. In the **Diff Range** field, enter or select the desired diff range.
- b. In the **Quantity** field, enter the quantity.
- c. Depending on whether you want to add or update a range in the prepack template, choose one of the following check boxes.
 - Select **Add Range** to add a new range to the prepack.
 - Select **Apply to Selected** to apply the update range to a selected diff.
 - Select **Apply to All** to apply the range to all records in the Differentiator section with the same diffs.



Note:

The **Apply to All** check box and the Apply to All button are only enabled, if a differentiator has already been added to the prepack template.

- d. After you have added/updated the diff range, choose one of the following options.
 - Click **OK** to apply the new/updated range to the prepack and close the Apply Range page. The system returns to the Prepack Creation page.
 - Click **Cancel** to reject all entries and close the Apply Range page. The system returns to the Prepack Creation page.
3. In the Prepack Creation page, choose one of the following options.
 - Click **Save and Close** to save the updated prepack and return to the Order Details page.
 - Click **Cancel** to reject the prepack updates and return to the Order Details page.

Mass Update

In the mass update you can update the quantity of the records set in the diff filter. The quantity is applied to all entries with this diff value.

To carry out a mass update for diffs, follow the steps below.

1. In the Prepack Creation page, select **Mass Update**. The Mass Update page opens.
2. In the Apply Update To section. Update all necessary Diff fields.



Note:

For item parents with assigned diff IDs, the Diff fields are populated and disabled.

3. If you select the **Apply Update to All** check box, all diffs are cleared and disabled. The entered quantity is applied to all entries.
4. In the **Quantity** field, enter the quantity.

5. After you have entered all necessary information, choose one of the following options.
 - Click **OK** to update the quantity for the diffs and close the Mass Update page. The system returns to the Prepack Creation page.
 - Click **OK and Edit Another** to update the quantity for the diffs and edit other diffs.
 - Click **Cancel** to reject all entries and close the Mass Update page. The system returns to the Prepack Creation page.
6. In the Prepack Creation page, choose one of the following options.
 - Click **Save and Close** to save the updated prepacks and return to the Order Details page.
 - Click **Cancel** to reject the prepack updates and return to the Order Details page.

Manage Order Contexts

Order context can be used to classify purchase orders in Merchandising. The list of valid order contexts is defined by a configurable list of codes and descriptions, which are managed through spreadsheet download and upload processes. These processes are accessed through the main Merchandising task list under Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data.

To add, update, or remove order contexts, you will select the template type of Foundation from the Download Data screen and then the template **Order Types**. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice.

Once opened, there will be 2 sheets that can be modified - PO Types and PO Types TL. The main tab is the PO Types tab, which is where new order types can be created, and existing types can be updated or deleted. Optionally, you can also add translated values for order types in the PO Types TL tab.

Add an Order Context

To add a new order context, start in the PO Types tab, and, in a blank line in the template, select the action type of Create. Next enter the description for the PO type in the primary language (as defined in the Merchandising system options) of up to 120 characters and a unique code for the PO type of up to 4 characters.

If you wish to add order type descriptions in any other languages, then select the PO Types TL tab and in a blank row select an action type of Create. Then, enter the translated description, the same code added in the PO Types tab, and select the language the description is written in. The translated description can also be up to 120 characters long. This is an optional step.

Update an Order Context

If you would like to update any details for order contexts, a similar process will be followed as that described above for creating new order types. First, download the spreadsheet, and then navigate to the tab where you would like to make your updates.

The following columns can be updated in each tab:

- PO Types – PO Type Desc
- PO Types TL – PO Type Desc

In the tab where you are going to make your updates, select the action type of Update, and then correct the value in the spreadsheet.

Delete an Order Context

If you wish to delete an order context because it is not used by your business any longer, update the action column to select Delete in each of the tabs where it occurs. This includes both PO Types and PO Types TL. Note that an order context cannot be deleted if it is currently associated with a purchase order, so an error will be raised if this occurs when the changes are uploaded.

Uploading Changes

For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and select Foundation Data > Upload Foundation Data from the main task list. In this screen, select the template type Foundation and the template Order Types. This will generate a process description automatically, but this can be updated if desired. Lastly, select the Browse button and navigate to the directory where you saved the updated spreadsheet.

To review the status of the upload and check whether any errors occurred, select the Foundation Data > Review Status task from the main task list.

See also [Download/Upload Data from Spreadsheets](#) and [View Data Loading Status](#).

Add Details

The Order Distribution page allows you to add items to a purchase order. You can add items by item number, reference item, or item list. You can choose to apply a template to an item parent or you can expand a buyer pack and item parent to their component items. You may also distribute the items, or a subset of the items, by diff values, store grade, and location.

The Order Distribution Page contains the following sections:

- Header
The header contains the order number as well as the supplier site.
- Distribute By
In the Distribute By section you can distribute/redistribute the items of a purchase order by individual differentiators (diffs), diff matrix, location and store grade
- Detail

Figure 2-12 Order Distribution Page

Order Distribution

Order No. 803 Supplier Site 2000 | Fashion Supplier Domestic Site

Distribute by ☒ Unit of Purchase ☐ Standard UOM

Differentiator Diff Matrix Location Store Grade Redistribute

Item Parent	Item	Item Description	Diff 1	Diff 2	Diff 3	Diff 4	Location	Country of Sourcing	UOP	Worksheet Quantity
101050146	101050189	Cotton Mini Skirt Yellow	YELLOW	6			US	US	Each	0

Save and Close Cancel

Detail

The item table displays the item parent, item, item description, diffs, location, country of sourcing, UOP/UOM and the worksheet quantity.

Add Items and Locations

To access the Order Distribution page and maintain items for a purchase order, follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link or select **Actions > View**. The Order page opens in a new tab.
5. In the Toolbar, click **Details**. The Order Distribution page opens, if the purchase order is still in status Worksheet and no items have been distributed yet.
 - If items have already been added, distributed and the order is still in Worksheet status, the **Details** button opens the Order Details page.
 - In the Items section, select **Actions > Add** or use the Add icon  to add items to the order. The Order Distribution page opens.

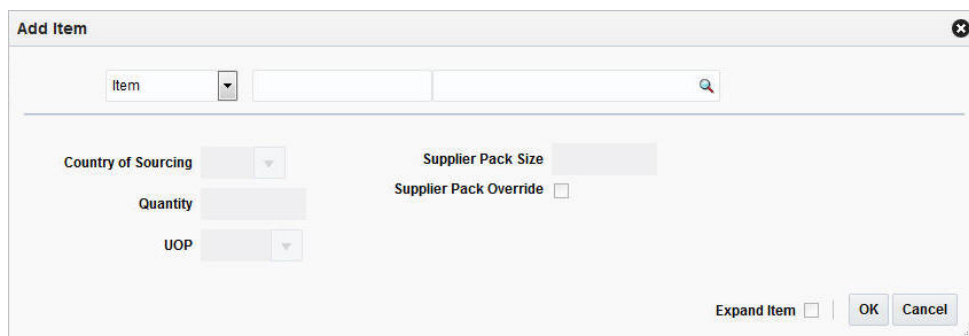
6. After you have added, edited, deleted or distributed items, choose one of the following options.
 - Click **Save and Close** to add the selected item to the purchase order and exit the Order Distribution page.
 - Click **Cancel** to reject the added items and exit the Order Distribution page.

Adding Items to a Purchase Order

To add an item to a new or already existing purchase order follow the steps below.

1. In the Order Distribution page, select **Actions > Add** or use the Add icon  to add items to the purchase order. The Add Item page appears.

Figure 2-13 Add Item Page



2. Select either the **Item**, **Reference Item**, or **Item List** option from the list.
3. Enter the item number of the item or the ID of the item list, or click the search icon to retrieve the desired item.
4. In the **Country of Sourcing** field, edit or select the country of sourcing, if required.
5. In the **Quantity** field, enter the number of units to be distributed for the item or among the components of an item list or item parent.
6. In the **UOP** field, enter or edit the unit of purchase as necessary.
7. If you want to edit the supplier pack size, check the **Supplier Pack Override** check box.
8. In the **Supplier Pack Size** field, edit the value accordingly.
9. To add the component items of an item parent or pack, click **Expand Item**.
10. After you have entered all the item information, choose one of the following options.
 - Click **OK** to add the current item, reference item, or item list and close the page. The system returns to the Order Distribution page. The item is shown in the table.
 - Click **Cancel** to reject all entries and close the page. The system returns to the Order Distribution page.
11. In the Order Distribution page, choose one of the following options.

- Distribute the items according to individual diffs, diff matrix, location or store grade. For more information about distributing items, see the [Distributing a Purchase Order](#) section.
- Click **Save and Close** to add the selected item to the purchase order and close the Order Distribution page.
- Click **Cancel** to reject the added items and close the Order Distribution page.

Editing Items on a new Purchase Order

To edit items on a new purchase order follow the steps below.

1. In the Order Distribution page, select **Actions > Edit** or use the Edit icon  to edit the items of the created purchase order. The Edit Item page opens.

Figure 2-14 Edit Items Page



2. In the **Country of Sourcing** field, edit the country of sourcing.
3. Then choose one of the following options.
 - Click **OK** to add the current item, reference item, or item list and close the Add Item page. The system returns to the Order Distribution page.
 - Click **Cancel** to reject all entries and close the Add Item page. The system returns to the Order Distribution page.

Deleting All Items from a new Purchase Order

To delete all items from the created purchase order, follow the steps below.

1. In the Order Distribution page, select **Actions > Delete All** or use the **Delete All** button to delete all items from the Item table.
2. The system displays a warning prompt.
 - Click **Yes** to delete all items. All items are removed from the Item table.
 - Click **No**. The items are not deleted.

Distributing a Purchase Order

You have several options for distributing items when a purchase order is created. Before distributing items, you can filter the items in order to display a subset of the items. Any distribution instructions that you enter are then applied only to the subset of items.

The options for distribution may be:

First select whether you want to distribute the items by UOP or Standard UOM. Then choose one of the following options.

- Distribution by individual diffs: Distribute items by the differentiator groups attached to it.
- Distribution by diff matrix: Distribute items by any diff value associated with the purchase order.
- Distribution by store grade: Select the final destinations by store grade group and store grade. Enter the distribution amounts by percentage or ratio.
- Distribution by location: Select the final destinations one-by-one or by a list of values. Enter the distribution amounts by percentage or ratio.

Order Distribution Advanced Filter

The Order Distribution Filter page allows you to filter the items that appear on the Order Distribution page. You can then edit or distribute the resulting subset of items.

To filter the items on a purchase order follow the steps below.

1. To filter the items shown in the Item table, select **Actions > Advanced Filter** or use the Advanced Filter icon. The Order Distribution Advanced Filter page opens.

Figure 2-15 Order Distribution Advanced Filter Page

Order Distribution Advanced Filter

Item

Diff 1

Diff 2

Diff 3

Diff 4

Location

Store Grade Group

Store Grade

Country of Sourcing

UOP

Standard UOM

Blank Diff 1 ☐

Blank Diff 2 ☐

Blank Diff 3 ☐

Blank Diff 4 ☐

Blank Location Type ☐

Blank Location ☐

Blank Store Grade Group ☐

Blank Store Grade ☐

Blank Quantity ☐

Add Filter Criteria

Actions View Detach Wrap

Item Parent	Item	Country of Sourcing	Diff 1	Diff 2	Diff 3	Diff 4	Locat
		BLACK					

Apply Filter Cancel

2. Enter, select or search for the criteria by which you want to filter the Item table.
3. Select **Add Filter Criteria**. The filter criteria are added to the Filter Criteria table.
4. To delete a criterion from the Filter Criteria table:
 - a. Select the record.
 - b. Select **Actions > Delete** or use the Delete icon . You are prompted to delete the record.
 - c. Confirm with **Yes**. The record is removed from the Filter Criteria table.
5. After you have added all filter criteria, choose one of the following options.
 - Click **Apply Filter** to display the results of the filter in the Order Distribution page and close page.
 - Click **Cancel**, to reject the filter criteria and close the page.
6. Edit the filter results as needed.
7. To clear the filter, select **Actions > Clear Filter** or use the Clear Filter icon. All items are displayed in the Item table again.

Distribute by Diff

Distributing Items by Individual Diff

The Distribute by Diff page allows you to distribute an item by the differentiator groups attached to the item. The user may use differentiator ranges and ratios while performing the distribution or perform the process manually. For each selected differentiator, the distribution can be carried out on the basis of quantity, percentage or ratio.

To distribute an item by individual diffs, follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Restrict the search to orders with the status Worksheet.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link or select **Actions > Edit**, or use the Edit icon. The Order page opens in a new tab.
5. In the Toolbar, click **Details**. The Order Distribution page opens.
6. Add items to the purchase order. For more information about adding items to the purchase order, see the [Adding Items to a Purchase Order](#) section.
7. In the Distribute by section go to Differentiator. Select a diff from the list. The Differentiator Distribution page opens.
8. The Differentiator Distribution contains the following sections.
 - Header: The header contains the selected diff group.
 - Diff Range: The Diff Range section contains all the available differentiator values.
 - Diff Ratio: The Diff Ratio section shows applied differentiator values, once the values are selected.
9. To limit the available diffs, go to the **Diff Range** field and enter or select a diff range ID.

10. Click **Apply**. The Available Differentiator column now only contains diff IDs limited to the chosen range.

 Note:

To apply multiple diff ranges, choose more than one valid range.

11. In the Available Differentiator area, choose one of the following options.
- Select a diff and click the right arrow button. The diff is moved to the Diff Ratio section to the Applied Differentiator column.
 - Select all diffs and click the move all right arrow button. All diffs are moved to the Diff Ratio section to the Applied Differentiator column.

 Note:

To deselect diffs, select the individual diff or all diffs. Then use the left arrow or move all left arrow buttons. The selected diffs move from the Applied Differentiator to the Available Differentiator column.

12. Select one of the following distribution methods.
- **Percent:** Enter the percentage of the items you want for each diff.
 - **Quantity:** Enter the number of items you want for each diff.

 Note:

You can only distribute by quantity, if you did not enter a quantity in the Order Distribution page.

- **Ratio:** Enter the proportion of the items you want for each diff.

 Note:

You can distribute the diffs and enter a percentage, quantity or ratio of zero (0).

13. After you have selected the diffs and the distribution method, choose one of the following options.
- Click **OK** to distribute by the selected diffs and close the Differentiator Distribution page. The system returns to the Order Distribution page. The individual diff distributions are shown in the table.
 - Click **Cancel** to reject all entries and close the Differentiator page. The system returns to the Order Distribution page.

Distributing Items with Diff Matrix

In the Diff Matrix page you can design a purchase order distribution based on up to three different group values.

To distribute items with a diff matrix follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Restrict the search to orders with the status Worksheet.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link or select **Actions > Edit**, or use the Edit icon. The Order page opens in a new tab.
5. In the Toolbar, click **Details**. The Order Distribution page opens.
6. Add items to the purchase order. For more information about adding items to the purchase order, see the [Adding Items to a Purchase Order](#) section.
7. Then select **Diff Matrix**. The Order Diff Matrix page opens in a new tab.

Figure 2-16 Order Diff Matrix Page

The Order Diff Matrix Page contains the following sections:

- Header: The header displays the order number.
 - Diff Selection
 - Distribution Matrix
8. Go to the Diff Selection section. In the Distribute By area indicate that you want to enter values in either Quantity, Ratio, or Percent.

 Note:

Quantity is automatically selected, if you do not enter the Worksheet Quantity in the Order Distribution page.

9. The Distribute by Selected Diffs column displays the available diffs, for example, colors, size or pattern. Each diff has a drop down list. Use the drop down list to assign an axis to the diff.

 Note:

The values in the drop down list depend on the number of available diffs.

10. In the Apply Diff Range column you can apply diff Ranges for the selected diffs, for example, the color range.

 Note:

The fields in the Apply Diff Range column are only enabled, once you select, the axis for the diffs.

11. Click **Apply**.
12. In the Distribution Matrix section the Actions menu and the buttons are enabled once you select and apply the diffs. The Distribution Matrix Actions menu contains the following options.
 - Click **Matrix Distribution** to display the matrix distribution. The Matrix Distribution page opens. For more information about the matrix distribution, see the [Matrix Distribution](#) section.
 - Click **Copy** to copy a diff, for example, Copy Color. Only one diff can be selected as copy form. The Copy page opens. For more information about the Copy page, see the [Copying Z Axis](#) section.

 Note:

The Copy function is available only if the parent item has three or more associated diffs.

- Click **Apply Diff Ratio** to modify the ratio. The Apply Diff Ratio page opens. For more information about applying diff Ratios, see the [Applying Diff Ratio](#) section.

 Note:

The Apply Diff Ratio function is only available, if the parent item has three or more associated diffs.

- Click **Recalculate Totals** or use the Recalculate icon  to recalculate all the totals in the distribution matrix.

13. Click **Convert to Quantity** to convert the Worksheet quantity, entered in the Order Distribution page, according to the ratio/percentage set for the individual diffs.

 Note:

If you select distribute by quantity, the function is not available.

14. After you have entered all necessary information, choose one of the following options.
 - Click **Save and Close** to save your entries and close the Order Diff Matrix Page.
 - Click **Cancel** to reject all entries and close the Order Diff Matrix page.

Matrix Distribution

The Matrix Distribution page contains two sections, the Y axis distribution, for example size option distribution such as S small and the X axis distribution, for example, color distribution such as black, brown, white.

The valid combinations of Distribute By values for X axis and Y axis distribution is based on the values you selected in the Order Distribution page. If no quantity was identified in the Order Distribution page, all three Distribute By options are available in the Matrix Distribution. If you entered a quantity in the Order Distribution page, only the Ratio and Percent distribution option is available.

Figure 2-17 Matrix Distribution Page

Matrix Distribution

* Apply To

Diff Ratio Store

Sizes Distribution

Distribute By ☒ Quantity ☐ Ratio ☐ Percent

Differentiator	Description	Distribution
S	Small	

Colors Distribution

Distribute By ☒ Quantity ☐ Ratio ☐ Percent

Differentiator	Description	Distribution
BLACK	BLACK	
BROWN	BROWN	
WHITE	WHITE	

OK OK and Distribute Another Cancel

To apply a distribution to a diff follow the steps below.

1. In the **Apply To** field, enter, select or search for the matrix distribution you want to apply to one or more Z axis diffs.

Note:

The **Apply To** field is only available, if you select three diffs.

2. In the **Diff Ratio** field, enter or select a X axis and/or Y axis diff.

Note:

Once you select the diff ratio, the details are displayed in the X or Y Distribution, in case the diff ratio is an X or a Y diff ratio.

3. In the **Store** field, enter, select or search for the store. This field is only enabled, if the Diff Ratio is associated to stores.
4. In the Y Axis Distribution section, select the desired distribute by option, for example, percentage.
5. The differentiators and description are shown in the table. In the Distribution column, enter the distribution value.
6. In the X Axis Distribution section, select the desired distribute by option, for example, ratio.

7. The differentiators and description are shown in the table. In the Distribution column, enter the distribution value.
8. After you have entered all values, choose one of the following options.
 - Click **OK** to save the entered distribution values and close the Matrix Distribution page.
 - Click **OK and Distribute Another** to save the entered distribution and enter additional distribution values for other diffs.
 - Click **Cancel** to reject all entries and close the Matrix Distribution page.

Copying Z Axis

The Copy page allows you to copy a matrix distribution. Select one row on the Z Axis Distribution section as basis and copy the matrix distribution to rows that have distribution values, if you enter no distribution nothing is copied to that diff.



Note:

Only one basis may be selected. If no basis is selected, then no matrix distribution is copied to the rows with distribution values.

Figure 2-18 Copy Pattern Page

Copy pattern

Distribute By ☒ Ratio ☐ Percent

View ▾ Detach

Differentiator	Description	Copy From	Ratio
FASHION	fashino	☐	
SCHOOL	school	☐	
FORAML	formal	☐	

OK Cancel

To copy the matrix distribution follow the steps below.

1. In the Distribute By area select the distribution option, for example, quantity, ratio or percent.
2. The differentiator and description are listed in the table.
3. Check the **Copy from** check box to identify the base diff.

Note:

The base diff is the diff whose Distribution Matrix is copied to the identified diffs.

4. After you have selected the desired diffs, choose one of the following options.
5.
 - Click **OK** to copy the matrix distribution of the selected diffs and close the Copy page.
 - Click **Cancel**. No matrix distribution is copied, the Copy page is closed.

Applying Diff Ratio

If you selected Ratio in the **Distribute By** field, you can use an existing diff ratio to modify data in the diff matrix table.

1. In the **Diff Basis** field, enter or select a diff basis.
2. In the **Diff Ratio** field, enter or select a diff ratio.

 Note:

If the selected diff ratio is associated to all three axes, the diff basis field is not needed.

3. The **Store** field is populated automatically, after you enter a diff basis and a diff ratio.
4. After you have selected diff basis and diff ratio, you choose one of the following options.
 - Click **OK** to apply the diff ratio and close the Apply Diff Ratio page.
 - Click **Cancel** to reject all entries and close the Apply Diff Ratio page.

Distribute by Location

Distributing Items by Location

To distribute items by location follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Restrict the search to orders with the status Worksheet.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link or select **Actions > View**. The Order page opens in a new tab.
5. In the Toolbar, click **Details**. The Order Distribution page opens.
6. Add items to the purchase order. For more information about adding items to the purchase order, see the [Adding Items to a Purchase Order](#) section.
7. In the Distribute by section select Location. The Distribute by Location page opens.

Figure 2-19 Distribute By Location Page

8. In the Distribute by section, select if you want to distribute by percent, quantity or ratio.
9. Select **Actions** > **Add** or use the Add icon  to add locations for distribution. The Add Locations page opens.

Figure 2-20 Add Locations Page

10. In the **Location Type** field, select the type of location, for example, store or warehouse.
11. In the **Location** field, enter, select or search for the location ID.
12. After you have selected the location, choose one of the following options.
 - Click **OK** to add the current location and exit the Add Locations page. The system returns to the Distribute by Location page. The location is shown in the table.
 - Click **OK and Add Another** to add further locations.

- Click **Cancel** to reject all entries and exit the Add Locations page. The system returns to the Distribute by Location page.

 Note:

To delete a location from the table in the Distribute By Location page, mark the location. Then select **Actions > Delete**.

13. If you select the following distribution method:

- **Percent:** Enter the percentage of the items you want at each location.
- **Quantity:** Enter the number of items you want at each location, or the total items you want at each location.

 Note:

You can distribute by quantity only if you did not enter a quantity on the Order Distribution page.

- **Ratio:** Enter the proportion of items that you want at each location.

 Note:

You can distribute to a location and enter a quantity, distribution or ratio of zero (0).

14. Choose one of the following options.

- Click **OK** to save your changes and close the Distribute by Location page. The distributions by location are shown in the table.
- Click **Cancel** to reject your entries and close the Distribute by Location page. The system returns to the Order Distribution page.

Distributing Items by Store Grade

To distribute items by store grade follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Restrict the search to orders with the status Worksheet.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link or select **Actions > View**. The Order page opens in a new tab.
5. In the Toolbar, click **Details**. The Order Distribution page opens.
6. Add items to the purchase order. For more information about adding items to the purchase order, see the [Adding Items to a Purchase Order](#) section.

7. In the Distribute by section select Store Grade. The Distribute by Store Grade page opens.

Figure 2-21 Distribute By Store Grade Page

Distribute By Store Grade

Distribute By ☒ Percent ☐ Quantity ☐ Ratio

Actions View + Refresh Print Detach

Store Grade	No. of Stores	Distribution %	Store Grade Quantity (EA)
No data to display.			

OK Cancel

8. In the Distribute By section, select if you want to distribute by percent, quantity or ratio.
9. Select **Actions** > **Add** or use the Add icon to add a store grade for distribution. The Add Store Grades page opens.
10. In the **Buyer** field, enter, select or search for the buyer ID.
11. In the **Store Grade Group** field, enter, select or search for the store grade group. The store grade is added to the table.
12. After you have entered the buyer and store grade group, choose one of the following options.
 - Click **OK** to add the store grade and exit the Add Store Grades page. The system returns to the Distribute By Store Grade page. The store grade is shown in the table.
 - Click **Cancel** to reject all entries and exit the Add Store Grades page. The system returns to the Distribute By Store Grade page.
13. If you select the following distribution method:
 - **Percent**: Enter the percentage of the items you want at each store grade.
 - **Quantity**: Enter the number of items you want at each store, or the total items you want for each store grade.

 Note:

You can distribute by quantity only if you did not enter a quantity on the Order Distribution page.

- **Ratio:** Enter the proportion of items that you want at each store grade.

14. Choose one of the following options.

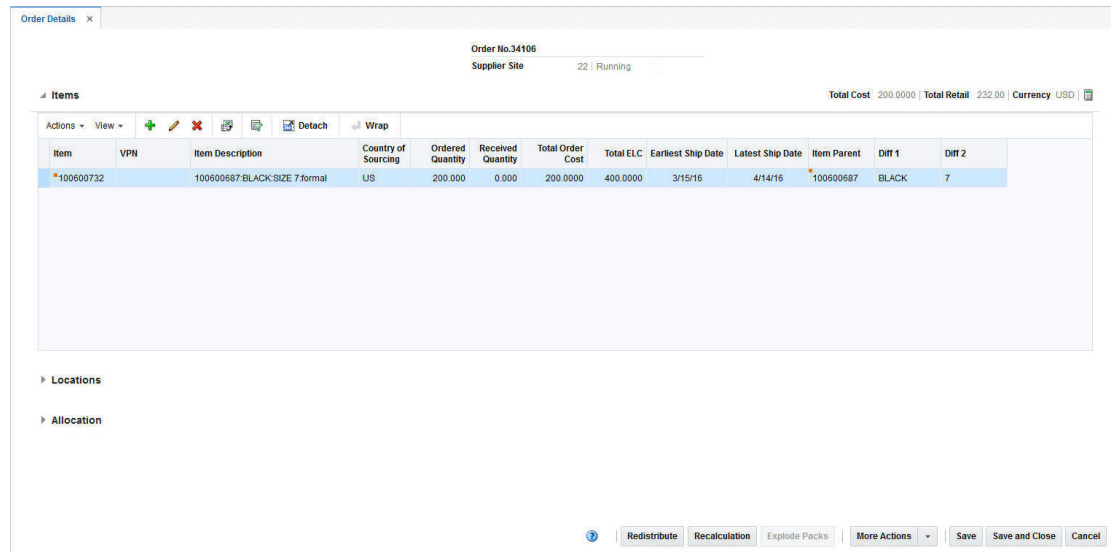
- Click **OK** to save your changes and close the Distribute By Store Grades page. The system returns to the Order Distribution page.
- Click **Cancel** to reject all entries and close the Distribute By Store Grades page. The system returns to the Order Distribution page.

Review Purchase Orders

Order Details

On a single purchase order, the same item might be delivered to different locations and can have different costs. In the Order Details page you can view and maintain the items, locations and allocation of a purchase order.

Figure 2-22 Order Details Page



Order Details x

Order No. 34106
Supplier Site 22 | Running

Total Cost: 200.0000 | Total Retail: 232.00 | Currency: USD

Items

Item	VPN	Item Description	Country of Sourcing	Ordered Quantity	Received Quantity	Total Order Cost	Total ELC	Earliest Ship Date	Latest Ship Date	Item Parent	DIF 1	DIF 2
100500732		100500687 BLACK SIZE 7 formal	US	200.000	0.000	200.0000	400.0000	3/15/16	4/14/16	100500687	BLACK	7

Locations

Allocation

Redistribute Recalculation Explode Packs More Actions Save Save and Close Cancel

Order Header

The Order Header contains the order number, supplier site and department.

Items

The Item section displays the total cost, total retail, currency as well as the Recalculate

Totals icon  in the top the right corner of the section. The table holds information about the item, country of sourcing, and quantities as well as the standard UOM/UOP, costs and ship dates.

Locations

The Locations section contains information about the location type and name, quantities, costs, discounts, currency as well as estimated in-stock date.

Allocation

The Allocations section contains information about the allocation number and description, location type and name as well as quantities.

Editing Items on an Existing Purchase Order

To edit an item to a purchase order follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link or select **Actions > Edit**, or use the Edit icon . The Order page opens in a new tab.
5. In the Toolbar, click **Details**. The Order Details page opens in a new tab.
6. In the Items section, select **Actions > Edit** or use the Edit icon . The Edit Item page opens.

Figure 2-23 Edit Items Page

- a. In the **Item** field, edit or search for a new item number.
- b. In the **Country of Sourcing** field, edit, select or search for another country of sourcing.
- c. In the **Supplier Pack Size** field, edit the pack size.
- d. In the **Earliest Ship Date** field, enter or click the Calendar button to select the earliest possible ship date.
- e. In the **Latest Ship Date** field, enter or click the Calendar button to select the latest possible ship date.
- f. Check the **Scaling Exempt** check box to indicate whether or not the order quantity of the item/location should be scaled during the order scaling process.
- g. After you have made all necessary changes, choose one of the following options.
 - Click **OK** to save the changes and exit the Edit Items page.
 - Click **OK and Edit Another** to save the changes and edit the next item in the table.
 - Click **Cancel** to reject all changes and exit the Edit Items page.

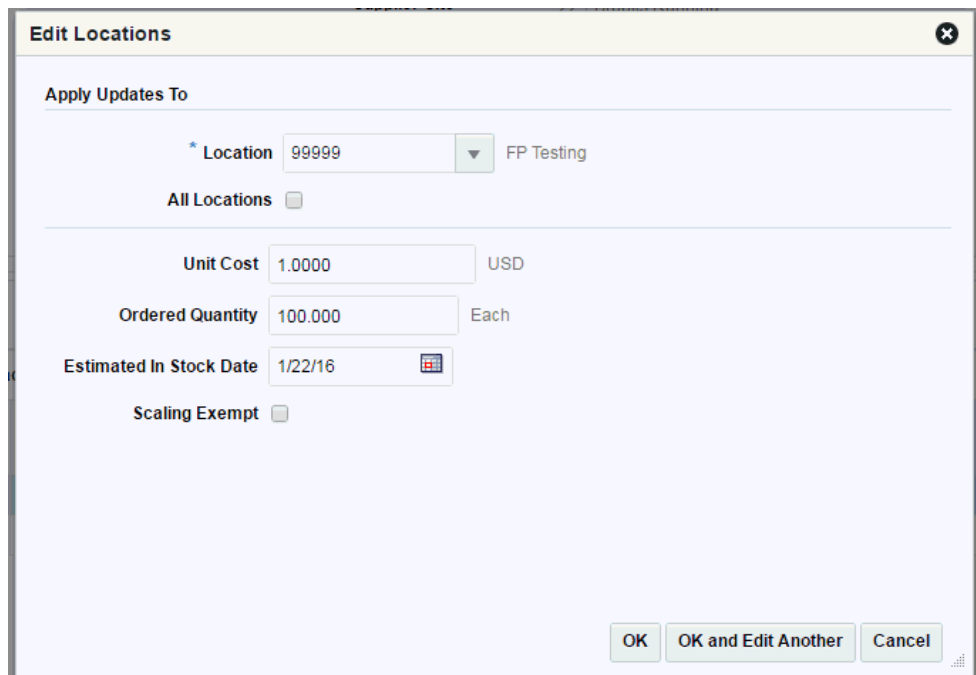
Editing Locations

In the Edit Location page you can edit either one or all locations of the selected purchase order. To edit the locations of a purchase order follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.

4. In the Order No. column, click the order number link or select **Actions > Edit**, or use the Edit icon . The Order page opens.
5. In the Toolbar, click **Details** to open the Order Details page.
6. In the Locations section select the location you want to update.
7. Select **Actions > Edit** or use the Edit icon  to update the selected location. The Edit Location page opens.

Figure 2-24 Edit Locations Page



Edit Locations

Apply Updates To

* Location 99999 ▼ FP Testing

All Locations ☐

Unit Cost 1.0000 USD

Ordered Quantity 100.000 Each

Estimated In Stock Date 1/22/16 

Scaling Exempt ☐

OK OK and Edit Another Cancel

- a. In the Apply Updates To section enter, select or search either for a single location in the **Location** field, or select the All Locations check box.
 - If you selected a single location the fields of the Edit location page are populated with the information of the selected location.
 - If the **All Locations** check box is checked, all fields of the Edit Location page are empty.
- b. In the **Unit Cost** field, edit the unit costs, if necessary.
- c. In the **Ordered Quantity** field, edit the quantity, if necessary.
- d. In the **Estimated In Stock Date** field enter or use the Calendar button to select a date.
- e. Select the **Scaling Exempt** check box, if necessary.

 Note:

If the **All Locations** checkbox is selected, the Scaling Exempt field contains a drop down list. If the scaling exempt is null, no change is applied to the locations. Otherwise, the selected scaling exempt is applied to all locations of the selected item.

- f. Select the **Cancel Remaining** checkbox if you want to cancel the available remaining item/location quantity.
- g. In the **Cancelled Quantity** field, enter the quantity if you want to cancel a part of the available remaining item/location quantity.
- h. In the **Cancelled Code** field, select the appropriate code from the list.
- i. To complete the edit location process, choose one of the following options.
 - Click **OK** to save the location changes and exit the Edit Locations page.
 - Click **OK and Edit Another** to save the current location changes and edit further locations.
 - Click **Cancel** to reject all location changes and exit the Edit Locations page.

View Pack Components on an Order

In the Order Pack Details page you can view the details of the component items of a pack on a purchase order.

The Order Pack Details page contains the following sections.

- [Order Pack Details Header](#)
- [Pack Components](#)
- [Order Pack Details Header](#)

Figure 2-25 Order Pack Details Page

Order Pack Details x

Order No. 80902 Pack 100001481 | pack item
Supplier Site 22 | B Location 756 | 56756

Pack Components Pack Ordered Quantity: 3,500.0 | Currency: USD

Item	Description	Quantity In Pack	Ordered Quantity	Received Quantity	Standard UOM	Supplier Unit Cost	Pack Component Cost
100001473	CEREAL	10.5	36,750.0		LBS	10.0000	9.5238

Done

Order Pack Details Header

The Order Pack Details header contains the order number, the supplier site, and the pack as well as the location.

Pack Components

The Pack Components section displays the Pack Ordered Quantity (quantity ordered for the pack/location) and Currency in the top right corner of the section.

The table displays the following columns by default.

- Item and Item Description
- Quantity In Pack
Displays the quantity of the component item in the pack.
- Ordered and Received Quantity
- Standard UOM
- Supplier Unit Cost
Displays the supplier unit cost of the component item, if bought individually.
- Pack Component Cost
Displays the cost of the item as a component of the pack.

Viewing Components of a Pack

To view the components of a pack on a purchase order follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link or select **Actions > Edit** or **View** or use corresponding icons. The Order page opens.
5. In the Order Toolbar, click **Details**. The Order Details page opens.
6. In the Locations section, click **Actions > Order Pack Details** to open the Order Pack Details page. The component items of the pack, the quantity of a pack, the ordered as well as the received quantity, the supplier unit cost and the pack component cost (the cost of the item as a component of the pack) are displayed.
7. Click **Done** to close the Order Pack Details.

Update Expenses

An expense is a cost component associated with moving a product from a supplier to the retailer, primarily dealing with importing. It is one of the components used to define landed costs in Merchandising. Examples include freight costs, shipping insurance, and so on.

Expenses can be set up to apply to different legs of the shipment. For example, there may be an ocean freight charged for transporting goods across the ocean (between the discharge and lading ports) and then other charges associated with moving the goods from the lading port to the warehouse that is inland (for example, land freight). The Order Location Expense Maintenance page allows users to maintain and view the importing and exporting expenses associated with a purchase order. The Order Location Expense Maintenance page may also be used to create and edit expense components for each order/item/location combination. Changes that are made at one location can be defaulted to all other locations within the same zone.

Figure 2-26 Order Expenses Page

Order Expenses x

Order No. 80902 Item 100001481 | pack item Zone 76657 | 67567
Zone Group 1000 | Location Based Zone Location 756 | 56756

Actions View + - Detach Wrap

Component	Description	Computation Value Base	Calculation Basis	Component Rate	Per Count	Per Count UOM	Value	Component Currency	Value UOP	Unit of Purchase
TEXP	Total Expense		Value	100.00			100.0000	USD	100.0000	EA

Save Save and Close Cancel

Order Expense Header

The Header section contains the order number, pack and item information, zone and zone group as well as the location. The pack information is only displayed when the item is a pack item.

Order Expense Table

Order Expense Table contains the following columns by default.

- Component ID and Description
- Computation Value Base
- Calculation Basis
- Component Rate
- Per Count and Per Count UOM
- Value (estimated)
- Component Currency
- Value UOP (estimated)
- Unit of Purchase

Viewing Order Expenses

To view the order expenses follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.

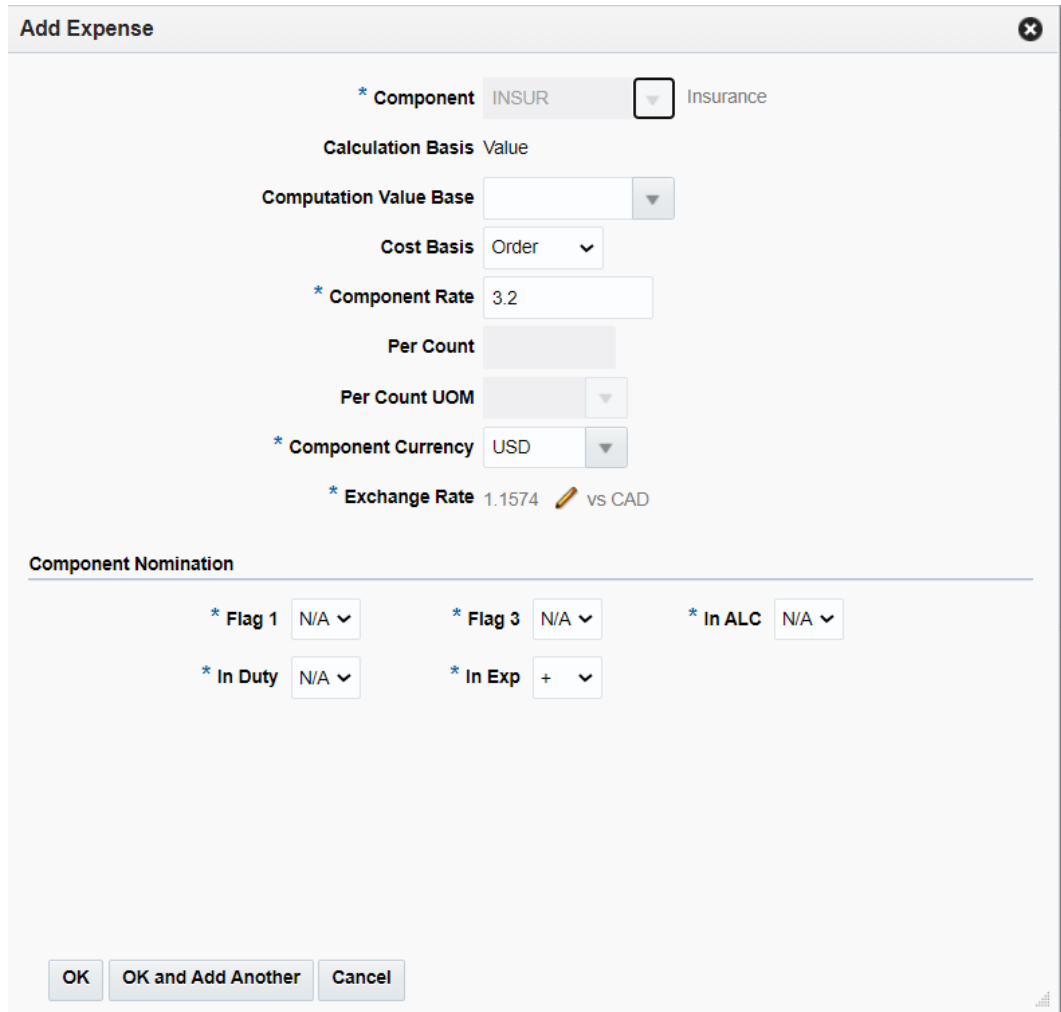
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link. The Order page opens in a new tab.
5. In the Toolbar, click **Details**. The Order Details page opens in a new tab.
6. In the Item section, select an item and from the Location section select the corresponding location.
7. In the Location section, select **Actions > Expenses**. The Order Expense page opens in a new tab.

Adding Expense

To add an expense to a purchase order follow the steps below.

1. Click **Actions > Add** or use the Add icon  to add an expense to the selected purchase order. The Add Expense page opens.

Figure 2-27 Add Expense Page



Add Expense

* Component Insurance

Calculation Basis

Computation Value Base

Cost Basis

* Component Rate

Per Count

Per Count UOM

* Component Currency

* Exchange Rate vs CAD

Component Nomination

* Flag 1 * Flag 3 * In ALC

* In Duty * In Exp

OK OK and Add Another Cancel

2. In the **Component** field, enter or select the type of expense component. This field is a required field.
3. The **Calculation Basis** field is populated once you select the component.

 Note:

Country level expenses have a specific as a calculation basis. Zone level expenses have a value as a calculation basis, exclusive CVB.

4. The **Computation Value Base** field is populated once you select the component. You can change the value, if necessary.
5. In the **Cost Basis** field is populated once you select the component. You can change the value, if necessary.
6. The **Component Rate** field is populated once you select the component. You can change the value, if necessary. This field is a required field.
7. The **Per Count** field is populated once you select the component. You can change the value, if necessary. This field is a required field.
8. The **Per Count UOM** field is populated once you select the component. You can change the value, if necessary.
9. The **Component Currency** field is populated once you select the component. You can change the value, if necessary. This field is a required field.
10. The **Exchange Rate** field is populated once you select the component. This is a required field and displays the exchange rate between the component currency and the currency of the locations on the order. Follow the steps below to change the value, if necessary.
 - a. Select the Edit Exchange Rate icon . The system displays the Exchange Rate Type and Exchange Rate field. Additionally, the Revert icon  is displayed.
 - b. In the **Exchange Rate Type** field, select the corresponding type from the list. Available types are Existing and Manual.
 - If you select Existing, the **Exchange Rate** field is enabled. Enter, select or search for an already existing rate.
 - If you select Manual, the **Exchange Rate** field is enabled. Enter the corresponding rate manually.
11. In the Component Nomination section enter or select the following fields. These fields are required fields.
 - Flag 1
 - Flag 3
 - In ALC
 - In Duty
 - In Exp
12. After you have entered all values, choose one of the following options.

- Click **OK** to add the expense to the selected purchase order and exit the Add Expense page.
- Click **OK and Add Another** to add the current expense to the selected purchase order and exit the Add Expense page.
- Click **Cancel** to reject all entered values and exit the Add Expense page.

13. In the Order Expense page, click the Recalculate icon  .

The estimated expense value of individual expense components is recalculated.

- For TEXP components the estimated value is calculated as a sum of estimated value of individual expense.
- For Country level expenses the estimated expense value is recalculated based on the component rate/per count and per count UOM.
- For zone level expenses the estimated expense value is calculated as a percentage of the order cost.

Editing Expense

To edit an expense of a purchase order follow the steps below.

1. In the Order Expense table, select a record.
2. Then click **Actions > Edit** or use the Edit icon  to edit an expense already associated with the selected order. The Edit Expense page opens. The current values of the selected expense are shown.

Figure 2-28 Edit Expense Page

Edit Expense

* Component BUYCOMM Insurance

Calculation Basis Value

Computation Value Base

Cost Basis Order

* Component Rate 1.50

Per Count

Per Count UOM

* Component Currency EUR

* Exchange Rate 1.761 vs CAD

Component Nomination

* Flag 1 N/A * Flag 3 N/A * In ALC N/A

* In Duty N/A * In Exp +

OK Cancel

3. The **Component** field is populated.
4. The **Calculation Basis** field is populated.

Note:

Country level expenses have a specific as a calculation basis. Zone level expenses have a value as a calculation basis, exclusive CVB.

5. The **Computation Value Base** field is populated. Change the value, if necessary.
6. In the **Cost Basis** field is populated. Change the value, if necessary.
7. The **Component Rate** field is populated. Change the value, if necessary.
8. The **Per Count** field is populated. Change the value, if necessary.
9. The **Per Count UOM** field is populated. Change the value, if necessary.
10. The **Component Currency** field is populated. Change the value, if necessary.
11. The **Exchange Rate** field is populated and displays the exchange rate between the component currency and the currency of locations on the order. Follow the steps below to change the value, if necessary.

- a. Select the Edit Exchange Rate icon . The system displays the Exchange Rate Type and Exchange Rate field. Additionally, the Revert icon  is displayed.
 - b. In the **Exchange Rate Type** field, select the corresponding type from the list. Available types are Existing and Manual.
 - If you select Existing, the **Exchange Rate** field is enabled. Enter, select or search for an already existing rate.
 - If you select Manual, the **Exchange Rate** field is enabled. Enter the corresponding rate manually.
12. In the Component Nomination section edit the following fields, if necessary.
- Flag 1
 - Flag 3
 - In ALC
 - In Duty
 - In Exp
13. After you have changed all necessary values, choose one of the following options.
- Click **OK** to save the expense changes for the selected purchase order and exit the Edit Expense page.
 - Click **Cancel** to reject all entered values and exit the Edit Expense page.

Update HTS Classifications

Within RTM, HTS codes are used to classify goods or products (that is assign one or more tariff classification numbers to an item) based on such things as its name, use, and/or the material used in its construction. HTS code definitions include formulas and rates for assessment calculations, as well as which, if any, taxes and fees must be paid. HTS codes have associated codes called Tariff Treatments or Special Programs. The codes indicate the free trade agreements or tariff preference programs for which the special rates are applicable. Assessments are charges incurred when clearing goods through customs. Assessments include duties, fees (Merchandise Processing Fee, Cotton Fee), and taxes (Tobacco, Alcohol).

In the Order HTS page you can add and delete HTS codes as well as add, edit and delete assessments for the selected order.

Figure 2-29 Order HTS Page

The screenshot displays the 'Order HTS' page. At the top, there is a table with columns: HTS, Description, Quota Category, Effect From, Effect To, and Status. The first row shows HTS '0102.21.0020', Description 'PUREBRED BREEDING', Quota Category, Effect From '03-Feb-12', Effect To '31-Dec-39', and Status 'Approved'.

Below the table is a 'Details' section with three columns: Item Quantity in HTS Reporting Units of Measure, Tariff Treatment Rates, and HTS Details. The first column has 'Quantity in Unit 1 UOM' (10.000 NO), 'Quantity in Unit 2 UOM', and 'Quantity in Unit 3 UOM'. The second column has 'Specific', 'Ad Valorem', and 'Other'. The third column has 'Duty Computation Code' (0), 'Anti-Dumping Case No.', and 'Countervailing Duty Case No.'.

At the bottom is an 'Assessments' table with columns: Component, Description, Computation Value Base, Calculation Basis, Rate, Per Cent, Per Count UOM, Value, and Value UOP. The first row shows Component 'DTY0AUS', Description 'DTY0AUS', Computation Value Base 'VFDUS', Calculation Basis 'Value', Rate '0.00', Per Cent, Per Count UOM, Value '0.0000', and Value UOP '0.0000'.

Order HTS Header

The Order HTS header contains the order number, the import country and the item or pack information. The pack information is only displayed when the item of the order is a pack item.

HTS

The HTS section contains the HTS associated to the order.

The Country of Sourcing is displayed in the top right corner of the section. The HTS tracking level determines if the Country of Manufacture is displayed. When the HTS is tracked at an item/supplier/country of manufacture level the Country of Manufacture is displayed next to the Country of Sourcing.

The HTS table shows HTS description, quota category, effective from/to dates as well as the status of the HTS.

Details

The Details section displays the Clearing Zone in the top right corner of the section. Additionally, the section contains the following three columns.

- **Item Quantity in HTS Reporting Units of Measure**
This column lists the applicable units of measure 1-3.
- **Tariff Treatment Rates**
This column lists rates, for example, specific or ad valorem rate.
- **HTS Details**
This column lists the duty computation code, anti-dumping case and countervailing duty case number.

Assessments

The Assessments section displays the Currency and the Unit of purchase (UOP) in the top right corner of the section. You can add, edit or delete assessments in this section. The Assessments table shows the following columns by default.

- Component ID and description
- Computation Value Base
- Calculation Basis
- Rate
- Per Count and Per Count UOM
- Estimated Value and Estimated Value UOP

Viewing HTS

To view HTS information follow the steps below.

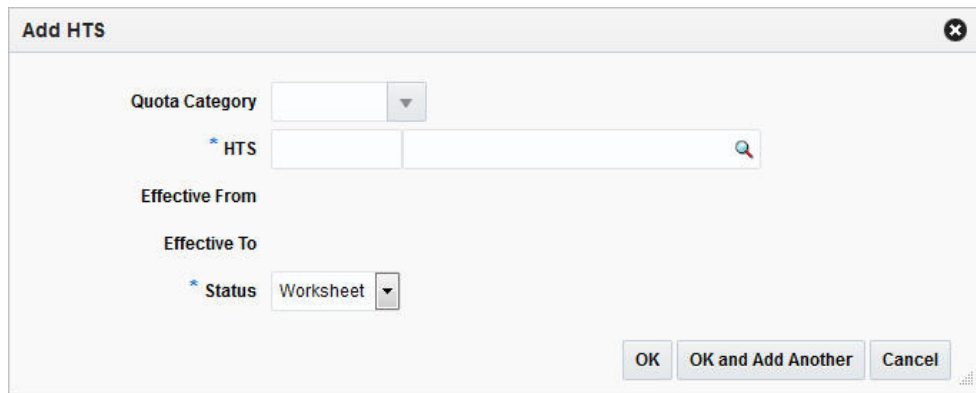
1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link or select **Actions > View** or use the View icon . The Order page opens.
5. In the Toolbar, click **Details** to open the Order Details page.
6. In the Item section, click **Actions > HTS** to open the Order HTS page.
7. Click **Done** to exit the Order HTS page.

Adding HTS

The Add HTS page allows you to add quota categories by import country. Customs agencies group items with related characteristics into quota categories. Restrictions can then be placed on the category rather than on individual items.

To add a HTS to a purchase order follow the steps below.

1. In the HTS section, select **Actions > Add** or use the Add icon  to add an HTS code to the selected purchase order. The Add HTS page opens.

Figure 2-30 Add HTS Page

2. The **Quota Category** field is populated automatically once you select the HTS code.
3. In the **HTS** field, enter, select or search for the HTS code you want to add to the purchase order. This field is a required field.
4. The **Effective From** field is populated automatically once you select the HTS code.
5. The **Effective To** field is populated automatically once you select the HTS codes.
6. In the **Status** field, select the status of the HTS. For example, select Worksheet. This field is a required field.
7. Choose one of the following options.
 - Click **OK** to add the selected HTS code to the purchase order and exit the Add HTS page.
 - Click **OK and Add Another** to add the selected HTS code to the purchase order and exit the Add HTS page.
 - Click **Cancel** to reject the entered HTS code and exit the Add HTS page.

Deleting HTS

To delete a HTS code from a purchase order follow the steps below.

1. In the HTS section select a record.
2. You are prompted to delete the HTS code, choose one of the following options.
 - Click **Yes**. The HTS code is removed from the HTS section.
 - Click **No**. No HTS code is not deleted.

Adding Assessment

To add an assessment to the selected purchase order follow the steps below.

1. In the Assessments section, click **Actions > Add** or use the Add icon  to add assessments. The Add Assessment page opens.

Figure 2-31 Add Assessment Page

The screenshot shows the 'Add Assessment' dialog box. It features a title bar with the text 'Add Assessment' and a close button. The main area contains the following fields and sections:

- * Component**: A dropdown menu.
- Computation Value Base**: A dropdown menu.
- Calculation Basis**: A text input field.
- * Rate**: A text input field.
- Per Count**: A text input field.
- Per Count UOM**: A dropdown menu.
- Component Nomination**: A section containing five dropdown menus:
 - * Flag 1**
 - * Flag 3**
 - * In ALC**
 - * In Duty**
 - * In Exp**

At the bottom right, there are three buttons: **OK**, **OK and Add Another**, and **Cancel**.

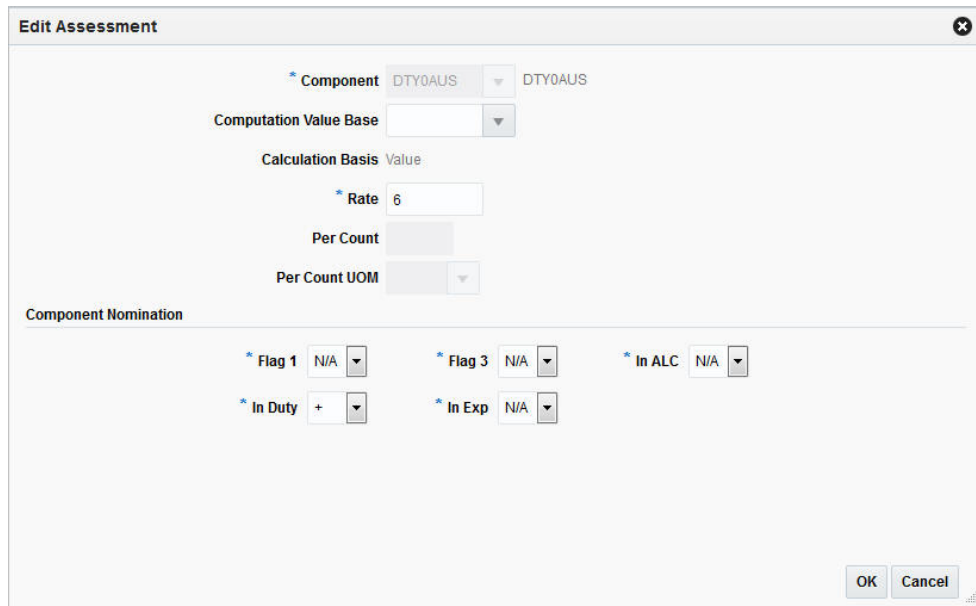
2. In the **Component** field, enter or select the cost component. This field is a required field.
3. The **Computation Value Base** field is populated automatically once you select the cost component.
4. The **Calculation Basis** field is populated automatically once you select the cost component.
5. The **Rate** field is populated automatically once you select the cost component. This field is a required field.
6. The **Per Count** field is populated automatically once you select the cost component.
7. The **Per Count UOM** field is populated automatically once you select the cost component.
8. In the **Component Nomination** section, the following fields are populated automatically once you select the cost component. These fields are required fields.
 - Nom Flag 1,
 - In Duty
 - Nom Flag 3
 - In Exp
 - In ALC
9. Choose one of the following options.
 - Click **OK** to add the assessment to the purchase order and exit the Add Assessment page.
 - Click **OK and Add Another** to add the assessment to the purchase order and exit the Add Assessment page.
 - Click **Cancel** to reject all entered values and exit the Add Assessment page.

Editing Assessment

To edit an assessment for the selected purchase order follow the steps below.

1. In the Assessments section, click **Actions > Edit** or use the Edit icon  to add assessments. The Edit Assessment page opens.

Figure 2-32 Edit Assessment Page



2. The **Component** field is populated with the selected component of the Assessment table.
3. The **Computation Value Base** field is populated automatically. If necessary edit the value.
4. The **Calculation Basis** field is populated automatically.
5. The **Rate** field is populated automatically. If necessary, edit the value. This field is a required field.
6. The **Per Count** field is populated automatically. If necessary, edit the value.
7. The **Per Count UOM** field is populated automatically. If necessary, edit the value.
8. In the **Component Nomination** section, the following fields are populated automatically. Edit the values, if necessary. These fields are required fields.
 - Nom Flag 1
 - In Duty
 - Nom Flag 3
 - In Exp
 - In ALC
9. Choose one of the following options.

- Click **OK** to add the assessment to the purchase order and exit the Add Assessment page.
- Click **Cancel** to reject all entered values and exit the Add Assessment page.

Deleting Assessment

To delete an assessment from a purchase order follow the steps below.

1. In the Assessment section select a record.
2. You are prompted to delete the assessment, choose one of the following options.
 - Click **Yes**. The assessment is removed from the assessment section.
 - Click **No**. The assessment is not deleted.

Order Summary

In the Order Summary page you can view a summary of items on a purchase order for a particular location. Select the location to view the details of the items which are sent to the selected location.

Figure 2-33 Order Summary Page

The screenshot displays the 'Order Summary' page. At the top, there's a header with 'Order No.' 80902 and 'Supplier Site' 22 | B. Below this, the 'Order Totals' section shows 'Cost' 500,000.0000, 'ELC' 1,000,000.0000, 'Retail' 603,950.00, and 'Quantity' 5,000.0. The 'Locations' section has a table with columns 'Location Type', 'Location', 'Name', and 'Total Cost UOP'. It lists 'Store' (5555555, 5555555, 150,000.0000) and 'Warehouse' (756, 56756, 350,000.0000). The 'Items' section has a table with columns 'Item', 'Description', 'Pack Size', 'Order Quantity UOP', and 'Unit of Purchase'. It lists item '100001481' as 'pack item' with a pack size of 1.0, order quantity of 1,500.0, and unit of purchase 'EA'. The page includes a 'Currency' dropdown set to 'USD' and a 'More Actions' button at the bottom right.

Location Type	Location	Name	Total Cost UOP
Store	5555555	5555555	150,000.0000
Warehouse	756	56756	350,000.0000

Item	Description	Pack Size	Order Quantity UOP	Unit of Purchase
100001481	pack item	1.0	1,500.0	EA

Order Summary Header

The Order Summary Header contains the order number, supplier, the order totals such as cost, estimated landed cost, retail value and order quantity.

Locations

The Locations section lists the available locations of the selected order. The section displays the currency in the top right corner. Additionally the section contains the Locations table. The table shows the location type and name as well as the total cost UOP by default.

Items

The Items section contains the Item table. This table displays all the items for the selected location. The item and item description, pack size, order quantity UOP and unit of purchase are shown by default.

Viewing an Order Summary by Location

To view an order summary by location follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link, or mark a record and select **Actions > Edit/View**, or use the corresponding icon. The Order page opens.
5. In the Toolbar, click **Details** to open the Order Details page.
6. In the Toolbar, click **More Actions > Summary by Location** to open the Order Summary page.
7. In the Locations section, select the desired location.
8. The items, sent to the selected location, are shown in the Items section.

 Note:

Select More **Actions > Currency > Order or Primary** to change the currency in the Order Totals section. The Retail label will not change regardless of the default tax type, only the value changes.

9. Close the tab or click **Done** to close the Order Summary page.

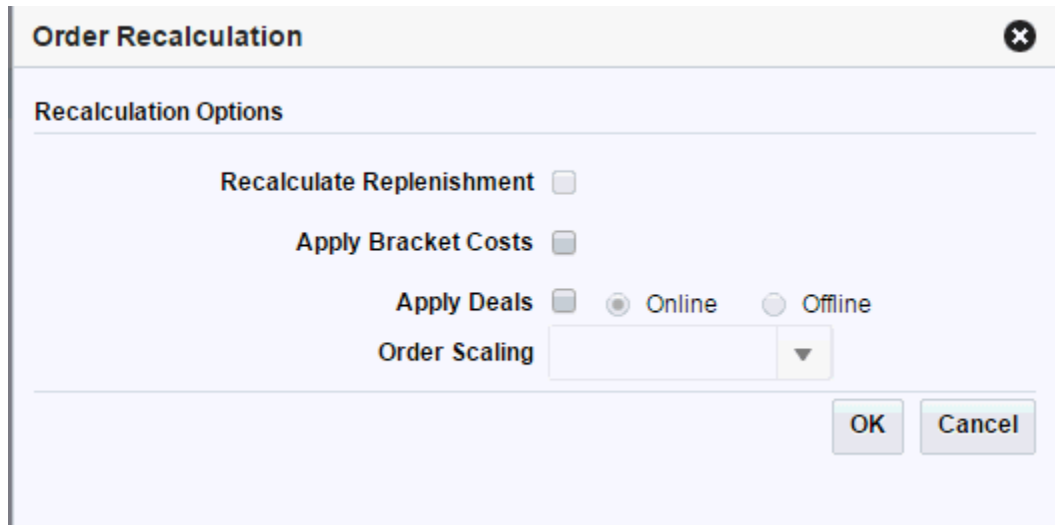
Recalculate Order Totals

The Order Recalculation page allows you to change components of the current order that affect its price. These components include: the base cost of the items, scaling, replenishment, bracket costs, deals, and landed cost. The Order Recalculation page allows you to recalculate the total order cost. You can decide which component to choose when calculating the total cost of the order.

To recalculate costs of the current purchase order follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Order page opens.
5. In the Toolbar select **More Actions > Recalculation**. The Order Recalculation page opens.

Figure 2-34 Order Recalculation Page



6. In the Order Recalculation page, choose between the following recalculation options.
 - Recalculate Replenishment

 Note:

The Recalculate Replenishment option is only displayed if the order is a replenishment order.

- Apply Bracket Costs
 - Apply Deals - online or offline
 - Order Scaling
7. Select the options you want to recalculate.
 8. To complete the recalculation, choose one of the following options.
 - Click **OK** to recalculate the selected options and close the Order Recalculation page.
 - Click **Cancel** to reject all recalculation options and exit the Order Recalculation page.

Retrieve a Purchase Order

Figure 2-35 Retrieve Purchase Order

The screenshot shows the 'Merchandising' application window. The main content area displays the details for 'Order No. 1535252'. The 'Store Review Status' is 'Pending' and the 'Total Order Cost' is '9,000.0000'. The order details are organized into two columns. The left column includes fields for 'Supplier Site' (21211 | US Site), 'Country Of Sourcing' (US), 'Location' (1204 | 1234), 'Currency' (USD), 'Order Exchange Rate' (1.0000 VS USD), 'Terms' (Term A), 'Pay Method' (Open Account), 'Invoice Location', 'Vendor Order', 'EDI' (checked), 'Pre Mark' (unchecked), and 'QC Required' (unchecked). The right column includes fields for 'Not Before Date' (3/5/23), 'Not After Date' (3/9/23), 'OTB End of Week Date' (3/11/23), 'Order Type' (RFB), 'Origin' (Replacement), 'Order Context', 'Buyer', 'Order by Prepack' (unchecked), 'Include On Order' (checked), 'Promotion', and 'Master Order'. At the bottom of the screen, there are buttons for 'Details', 'Retrieve', 'More Actions', and 'Done'.

When using the functionality to allow Purchase Orders generated by semi-automatic replenishment to be reviewed by the store, the Worksheet Orders generated will carry a Store Review Status of 'Pending' and will not be available for update in Merchandising till the Store Review process is complete and the Store Review Status has been updated to 'Completed' for the Order.

In case a purchase order pending for Store Review needs to be updated or Approved in Merchandising as an exception, the Order can be removed from the Store review queue by clicking on the 'Retrieve' button. Exercising the retrieve option will update the Store Review Status to Expired for the Order that has been retrieved and enable its edit in Merchandising.

Approve a Purchase Order

When a purchase order is added to the system, it must go through a series of checks before it is accessible in the system. Depending on your user role, you may not be able to move the purchase order to the next status. A purchase order may be in any of the following statuses:

Status	Definition
Worksheet	The purchase order has been started, but not completed.
Submitted	The purchase order has been completed and is pending review.
Approved	The purchase order has been reviewed and has been approved.
Delete	The purchase order is marked for deletion. It will be deleted by a regularly scheduled batch program.
Closed	The purchase order is complete.

To move a purchase order to the next step follow the steps below.

[Submitting a Purchase Order for Approval](#)

[Approving a Purchase Order](#)

[Delete a Purchase Order](#) in the [Manage Purchase Orders](#) chapter

[Cancel All Items on a Purchase Order](#) in the [Manage Purchase Orders](#) chapter

[Reinstate All Items of a Purchase Order](#) in the [Manage Purchase Orders](#) chapter

Submitting a Purchase Order for Approval

To submit a purchase order for approval follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Restrict the search to status **Worksheet**.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the desired order number link. The Order page opens.
5. In the Toolbar the **Submit** button is displayed. Click **Submit**.
6. You are prompted to submit the purchase order.
7. Click **Yes**. The status of the purchase order changes to Submitted.
8. Choose one of the following options.
 - Click **Save** to save and submit the purchase order for approval.
 - Click **Save and Close** to save and submit the purchase order for approval. The Order page is closed.
 - Click **Cancel** to reject your changes and exit the Order page.

Approving a Purchase Order

To approve a purchase order follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Restrict the search to status Submitted.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the desired order number link. The Order page opens.
5. In the Toolbar the **Approve** button is displayed. Click **Approve**.
6. You are prompted to approve the purchase order.
7. Click **Yes**. The status of the purchase order changes to Approved.

Note:

You can change the status back to Worksheet at this stage. Open the Status list and select the **Worksheet**.

8. Choose one of the following options.
 - Click **Save** to save and approve the purchase order.
 - Click **Save and Close** to save and approve the purchase order. The Order page is closed.

- Click **Cancel** to reject your changes and exit the Order page.

3

Create Specialty Purchase Orders

Apart from automatically generated purchase orders and manually created basic purchase orders, Merchandising provides a few special workflows to create orders. These purchase orders are usually created for a specific purpose. The following specialty purchase orders can be created in Merchandising:

Contract Orders

This workflow provides the option of creating orders for the items that are part of Plan/Availability type contracts. When a retailer enters into such contracts with a supplier, suppliers communicate availability to retailers as the production progresses. Based on the supplier availability, periodic purchase orders are created. In this workflow, the contract is selected as first step and only items attached to that contract are available to be added to the order.

Contract purchase orders are different from regular orders in a few ways. Since contract POs are supposed to have lowest negotiated cost, they cannot further have bracket costing or deals applied on them. They cannot have scaling or truck splitting either. These orders cannot be sent to Buyer Worksheet and they don't have pre-mark ability. Non-sellable packs and non-contracted items cannot be added to contract orders.

Order for Contracted Items

This workflow provides option of creating orders for items that are associated with one of more contracts. Here the user can choose the items, choose which contract to use for ordering the item, select ordering locations and quantity, and finally create the purchase order. Except Plan/No Availability type of contracts, orders for items attached with all other contract types can be created here. All the characteristics of contract orders mentioned above will be applicable to these orders as well.

DSD Orders

Merchandising can be configured to create a purchase order for items that are received directly at the store without a prior purchase order issued to the supplier. Usually such orders are created after the supplier has delivered items in the store along with invoices. However, they can be prepared before receipt as well, depending on the business process. Such orders can be created only for selected suppliers who are configured as DSD suppliers in Merchandising. Merchandising provides the option to attach invoices and non-merchandise expenses to such orders. When Merchandising is configured to not allow creation of DSD orders, such orders are created by store inventory management system and interfaced to Merchandising, where they can't be edited.

Pre-issued Orders

Sometimes, to expedite the ordering process when meeting with suppliers, there is a desire for orders to be placed immediately, even before they are entered into Merchandising. Merchandising provides the ability to pre-issue order numbers such that suppliers can be issued a valid purchase order number along with quantity and expiration date to support this business requirement. Later these numbers can be used to create a valid purchase order, capturing all required details. For example: A buyer can travel to a trade show with a number of pre-issues order numbers and issue them to suppliers depending on the negotiations.

Then when the buyer returns to office, a formal purchase order will be created with the pre-issued number.

Customer Orders

As the name suggests, customer order purchase orders are another special type of purchase order that is created for the fulfillment of a customer order by supplier, sometimes referred to as "drop ship" orders. Customer details such as billing information, delivery information etc. is mandatory to be captured on such orders. These orders are usually generated automatically as part of customer order fulfillment process and sent to Merchandising from an order management solution but can also be created manually in Merchandising by selecting order type as Customer Order. The ability to manually create these in Merchandising is supported only when the system option for integrating with an OMS is set to No.

Create a Contract Order

To create a contract order follow the steps below.

1. From the Tasks menu, select **Orders > Create Contract Order**. The Create Contract Order page opens.

Figure 3-1 Create Contract Order Page

The screenshot shows a 'Create Contract Order' dialog box with the following fields and values:

- * Contract**: 135000
- * Supplier Site**: 11 (labeled 'Supplier Site')
- * Order Type**: N/B
- Not Before Date**: (empty, with calendar icon)
- Not After Date**: (empty, with calendar icon)
- Import Country**: US
- Department**: 1010 (labeled 'Kids Shoes')

Buttons: OK, Cancel

2. In the **Contract** field, enter, select or search for the contract number. This field is required to create a contract order.
3. The **Supplier Site** field is populated with the contract's supplier site, once you select a contract number. This field is required to create a contract order.
4. In the **Order Type** field, select an Order Type from the drop down list. This field is required to create a contract order. Possible order types are:
 - ARB - Automatic replenishment of basic goods
 - BRB - Buyer replenishment of basic goods
 - N/B - Order of non-basic goods

5. In the **Not Before Date** field enter or use the Calendar to select the date before which the order deliveries are not expected.
6. In the **Not After Date** field enter or use the Calendar to select the date after which the order deliveries are not accepted.
7. The **Import Country** field is populated with the contract's import country, once you select a contract number.
8. The **Department** field is populated with the contract's department, once you select a contract number.
9. After you have entered all the information for the contract order, you have the following options.
 - Click **OK** to create the contract order and close Order page. The Order page opens automatically in a new tab.
Enter the necessary order information. For more details about the Order page, see the [Define/Enter a Purchase Order](#) section.
 - Click **Cancel** to reject the contract order and close the Create Contract Order page.

Create an Order for Contracted Items

In the Orders for Contracted Items page you can manually create orders with a contract. You can choose the items, associate them with a contract, select order locations, and quantities as well as create orders for the items.

The Orders for Contracted Items page consists of the following three sections:

- Items
- Locations
- Orders

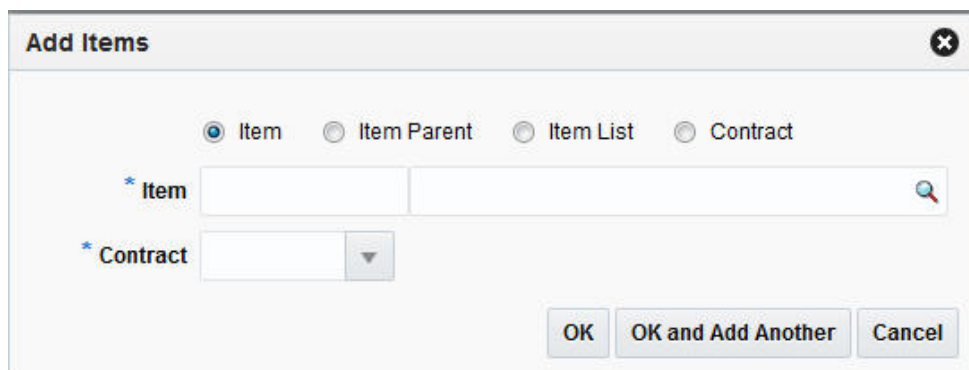
Figure 3-2 Orders for Contracted Items Page

The screenshot shows the 'Orders for Contracted Items' page. It features a tabbed interface with the 'Orders for Contracted Items' tab selected. The page is divided into three main sections: 'Items', 'Locations', and 'Orders'. The 'Items' section contains a table with columns: Item, Description, Unit Cost, Total Cost, Contract, Type, and Quantity (with sub-columns for Ordered and Available). The 'Locations' section contains a table with columns: Type, Location, Name, and Quantity. Both tables currently display 'No data to display.' The 'Orders' section is partially visible at the bottom. At the bottom right, there are buttons for 'Build Orders' and 'Done'.

To create orders for contracted items follow the steps below.

1. From the Tasks menu, select **Orders > Create Orders for Contracted Items**. The Orders for Contracted Items page opens.
2. In the Items section select **Actions > Add** or use the Add Item  icon to add an item. The Add Items page opens.

Figure 3-3 Add Items Page



- a. You can add contracted items by selecting:
 - a transaction level item
 - an item parent
 - an item list
 - a contract
- b. Check the corresponding radio button.

 Note:

If the **Item/Item Parent/Item List** radio button is selected, the corresponding fields are displayed. If the **Contract** radio button is selected, then only the **Contract** field is shown.

- c. In the **Item/Item Parent/Item List** field, enter, select or search for the item/item parent or item list.

Table 3-1 Add Items Page

Field	Description
Item	Enter or search for the item. If you select the contract before you enter any items, only items from this particular contract are available.

Table 3-1 (Cont.) Add Items Page

Field	Description
Item Parent	Enter or search for the item parent. All contracted item parents are available for selection. After you have entered the item parent, all diffs associated with the item are displayed. All diff IDs will be available for selection. If there is no valid item for a particular diff ID, then nothing is shown in the Items section. If no diffs are selected, all transaction level items are shown in the Items section. If all parent diffs are not selected, all items fitting the criteria are added. If you enter the contract before you enter the item parent, all contracted item parents are available for selection. If the combination of item parent and contract is not valid, then nothing is populated in the table. If all the child items are not part of the selected contract, you receive a warning message that one or more child items are not part of the contract.
Item List	Enter or search for the item list. All item lists, which have at least one contracted item, are available for selection. If you enter the contract before you enter the item list, all item lists having at least one contracted item are available. As long as at least one valid combination of item-contract is possible, all the contracted items of the item list are populated in the items table. If all the items in the item list are not part of the selected contract, you receive a warning message that one or more items are not part of the contract.
Contract	Enter the contract number. All the items of the selected contract are populated in the Items table.

- d. In the **Contract** field, enter, select or search for the contract.

 Note:

If you enter the item parent first, only contracts containing the item/item parent are available for selection. For item lists, all contracts associated with at least one item of the item list are available for selection.

- e. After you have entered all the item information, choose one of the following options.
- Click **OK** to add the selected item to the Items section and exit the Add Item page.
 - Click **OK and Add Another** to add further entries.
 - Click **Cancel** to reject all entries and exit the Add Item page.

Figure 3-4 Orders for Contracted Items Page - Items Added

The screenshot shows the 'Orders for Contracted Items' page. The 'Items' section contains a table with columns: Item, Description, Unit Cost, Total Cost, Contract, Type, and Quantity (Ordered, Available). The table lists two items: 'IMPORT REG ITEM' and 'Item Induction Regular'. The 'Locations' section contains a table with columns: Type, Location, Name, and a search bar. The table lists several locations with 'Supplier Site' as the type. The 'Orders' section is currently empty.

Note:

To delete an item, mark the corresponding record in the Items section. Then select **Actions > Delete** or use the Delete Icon . If an item is associated with multiple contracts or in the case of a parent item or item list, the selected contract combination is not valid. You can select the contract number in the Contract column from the drop down list.

3. After you have added items, assign a location or more locations to each item. Locations can only be assigned to one item at a time. Select an item on the table to assign locations to it.
4. In the Locations section select **Actions > Add** or use the Add icon to add a location. The Add Location page opens.

Figure 3-5 Add Location Page

The screenshot shows the 'Add Location' page. It has a title bar with a close button. The main area contains a 'Location' field with a dropdown arrow, a 'Quantity' field, and an 'Apply to all the Items' checkbox. At the bottom, there are three buttons: 'OK', 'OK and Add Another', and 'Cancel'.

- a. In the **Location** field, select a location type and enter, select or search for a location.

- b. In the **Quantity** field, enter the corresponding quantity to be ordered.

 Note:

If you want to apply the location and the corresponding quantity to all items, check the **Apply to all the items** check box.

- c. After you have entered all the location information, choose one of the following options.

- Click **OK** to confirm the location and close the Add Location page.
- Click **OK and Add Another** to add additional locations.
- Click **Cancel** to reject all entries and close the Add Location page.

 Note:

To delete a location, mark the corresponding row in the Locations section. Then select **Actions > Delete** or use the Delete icon .

If you want to edit the quantity for a location, enter the new quantity in the Quantity column.

5. After you have selected the location, you need to generate purchase orders for the selected contracted items.

In the Toolbar, click **Build Orders** to populate the Order section with pending orders.

 Note:

The **Build Orders** button is only enabled, after you have associated each item with a location and a quantity.

6. Click the **Create Order** button or select **Actions > Create Orders** to create orders for the contracted items. The status of the order changes to Created.

 Note:

The **Order Type** field is set to N/B by default.

The **Not Before** and **Not After Date** fields contain the dates specified in the contract.

You can edit the **Order Type**, **Not Before** and **Not After Date** fields in the Orders section.

7. To edit the created purchase order, select the corresponding order. Then use one of the following options.

- Select **Actions > Edit** or use the Edit icon . The Order page opens. For more details about editing orders, see the [Define/Enter a Purchase Order](#) section.
 - In the Order column, click the order number. The Order page opens. For more details about editing orders, see the [Define/Enter a Purchase Order](#) section.
8. Click **Done**, to exit the Orders for Contracted Items page.

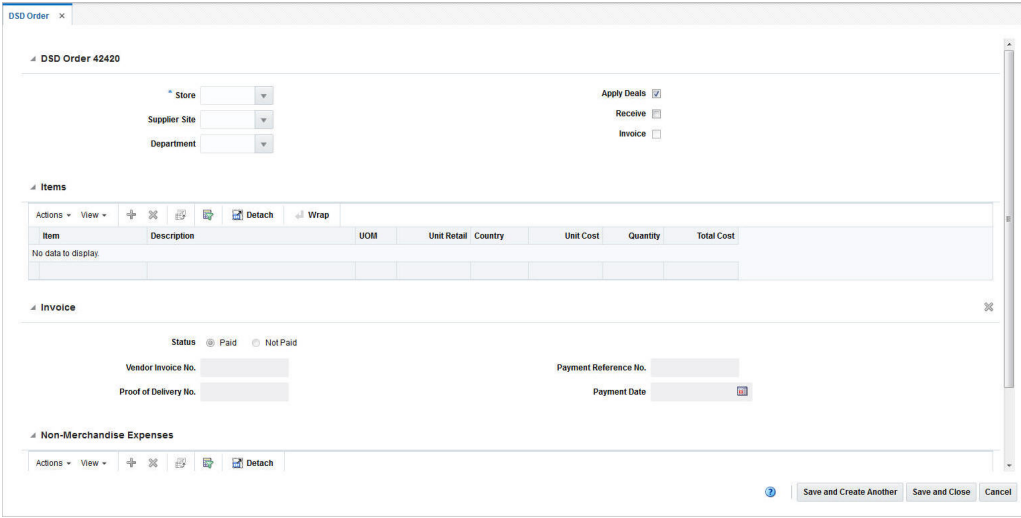
Create a DSD Order

The Direct Store Delivery (DSD) is the delivery of merchandise and/or services directly to a store. In the DSD Order page you can create direct store deliveries.

The DSD Order page consists of the following sections:

- DSD Order
- Items
- Invoice
- Non-Merchandise Expenses

Figure 3-6 DSD Order Page



The screenshot shows the 'DSD Order' page with the following sections:

- DSD Order 42420**: Includes dropdowns for Store, Supplier Site, and Department. Checkboxes for Apply Deals, Receive, and Invoice are on the right.
- Items**: A table with columns: Item, Description, UOM, Unit Retail, Country, Unit Cost, Quantity, and Total Cost. The table is currently empty with the message 'No data to display'.
- Invoice**: Includes a Status dropdown (set to Paid), and input fields for Vendor Invoice No., Proof of Delivery No., Payment Reference No., and Payment Date.
- Non-Merchandise Expenses**: Includes an Actions dropdown and a Detach button.

At the bottom right, there are buttons: 'Save and Create Another', 'Save and Close', and 'Cancel'.

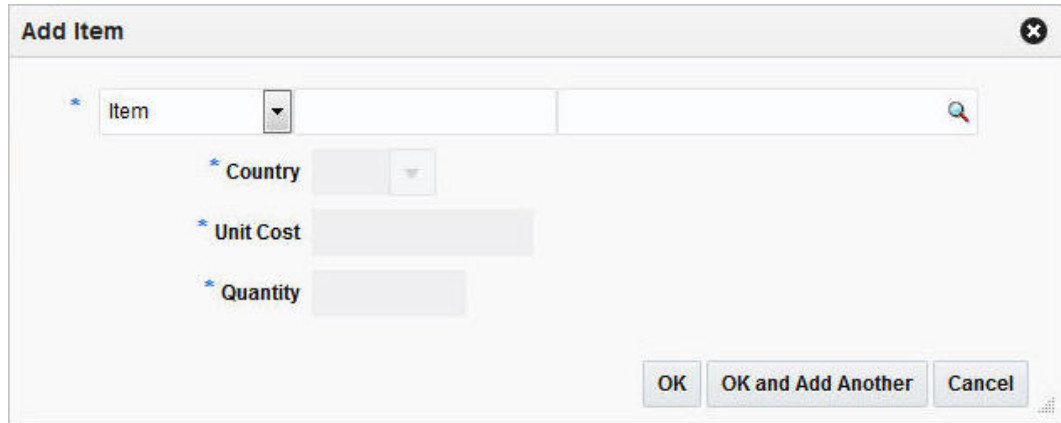
To create a DSD order follow the steps below.

1. From the Tasks menu, select **Orders > Create DSD Order**. The DSD Order page opens.
2. In the DSD Order section the title contains the order number as well as the order currency. In this section enter or select the following DSD order information.
 - Store - This field is required to create a DSD order.
 - Supplier Site
 - Department

Furthermore, select the following check boxes, if necessary.

- Apply Deals
 - Receive
 - Invoice
3. In the Items section, you can associate the item with the DSD order. To add an item select **Actions** > **Add**, or use the Add icon . The Add Item page opens.

Figure 3-7 Add Item Page



- a. Select the item level. Then enter or search for the item/reference item number.
- b. In the **Country** field, enter, select or search for the country information for the item.
- c. In the **Unit Cost** field, enter the unit cost for the item.
- d. In the **Quantity** field, enter the quantity for the item.
- e. After you have entered all necessary information, choose one of the following options.
 - Click **OK** to add the entered item to the Item section and close the Add Item page.
 - Click **OK and Add Another** to add the entered item to the Item section and stay in the Add Item page to add additional items.
 - Click **Cancel** to reject all entries and close the Add Item page.

 Note:

To delete the item from the DSD order, select **Actions** > **Delete** or use the Delete icon .

4. The Invoice section displays invoice related information for the DSD order.
 - a. In the **Status** field, select the valid status, paid or not paid, for the invoice.
 - b. In the **Vendor Invoice No.** field, enter the vendor invoice number.

- c. In the **Proof of Delivery** field, enter the proof of delivery number.
- d. In the **Payment Reference No.** field, enter the payment reference number.
- e. In the **Payment Date** field, enter the payment date or click the Calendar button to select the date.

 Note:

To delete an entered invoice, use the Delete Invoice icon in the top right corner of the Invoice section.

5. In the Non-Merchandise Expenses section, select **Actions > Add** or use the Add icon. The Add Non-Merchandise Expense page opens.
 - a. In the **Code** field, enter or search for the expense code of the non-merchandise expense, for example, select M (Miscellaneous).
 - b. In the **Amount** field, enter the expense amount.
 - c. In the VAT section, in the **Code** field, enter, select or search for the VAT code, for example, select Standard.
 - d. In the **Rate** field, the VAT rate is populated once you enter the VAT code.
 - e. In the **Amount** field, the VAT amount is populated once you enter the VAT code.
 - f. After you have entered all necessary information, choose one of the following options.
 - Click **OK** to add the entered expense information to the Non-Merchandise Expense section and close the page.
 - Click **OK and Add Another** to add the entered expense information to the Non-Merchandise Expense section and stay in the page to add additional non-merchandise expenses.
 - Click **Cancel** to reject all changes and close the page.

 Note:

To delete non-merchandise expenses from the DSD order, select **Actions > Delete** or use the Delete icon .

6. After you have entered all necessary information for the DSD order, choose one of the following options.
 - Click **Save and Close** to create the DSD order and close the DSD order page.
 - Click **Save and Create Another** to create the DSD order and stay in the DSD Order page to create additional DSD orders.
 - Click **Cancel** to reject all entries and close the DSD order page.

Create a Pre-Issued Order

In Merchandising you can create a purchase order using a pre-issued order number. For more details about how to generate pre-issue order numbers, see the [Pre-Issued Order Numbers](#) section.

To create a pre-issue order follow the steps below.

1. From the Tasks menu, select **Orders > Create Pre-Issue Order**. The Create Pre-Order page opens.

Figure 3-8 Create Pre-Issue Order Page

Create Pre-Issue Order

* Pre-issued Order No.

* Supplier Site

* Order Type N/B

Not Before Date

Not After Date

Single Location Order ☐

Import Country US

Department

OK Cancel

2. In the **Pre-Issued Order No.** field, enter, select or search for the previously created pre-issued order number.
3. In the **Supplier Site** field, enter, select or search for the supplier site.
4. In the **Order Type** field, select an order type from the list. Possible order types are:
 - ARB - Automatic replenishment of basic goods
 - BRB - Buyer replenishment of basic goods
 - Customer Order - For more information about how to create a customer order, see the [Create a Customer Order](#) section.
 - N/B - Order of non-basic goods
5. In the **Not Before Date** field, enter the date before which the order deliveries are not expected, or use the Calendar icon to select a date.
6. In the **Not After Date** field, enter the date after which the order deliveries are not accepted, or use the Calendar icon to select a date.
7. Select the **Single Location Order check box** if the items of the purchase order are shipped to only one location.

8. In the **Location** field, select the Location Type, for example, select Warehouse. Once you select the Location Type, enter, select or search for the location. After you have selected the location, the Location Name is displayed.

 Note:

The **Location** fields are shown only if you have selected the **Single Location Order** check box.

9. In the **Import Country** field, enter, select or search for the import country.

 Note:

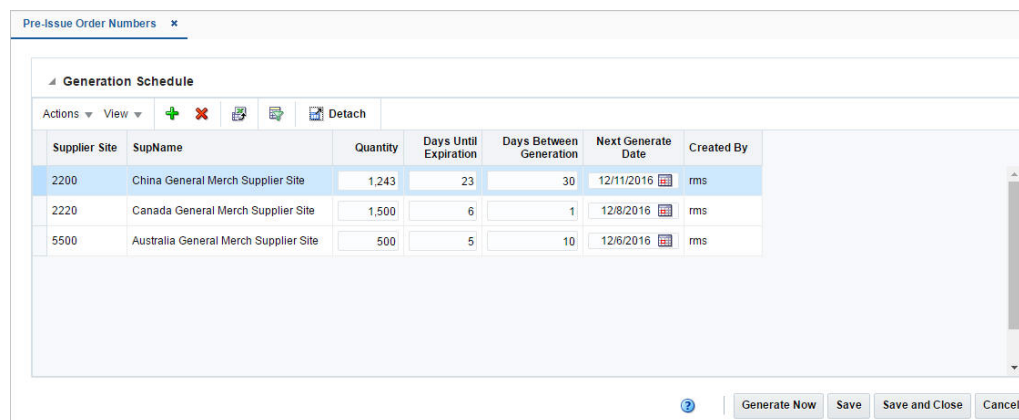
The **Import Country** field is enabled when you create pre-issue orders.

10. In the **Department** field, enter, select or search for the department.
11. After you have entered all information for the pre-issue order, you have the following options.
 - Click **OK** to create the pre-issue order and close the Create Order page. The Order page opens in a new tab. Enter the necessary order information. For more details about creating orders, see the [Create a Purchase Order](#) section.
 - Click **Cancel** to reject all entries and close the Create Order page.

Pre-Issued Order Numbers

Pre-issued order numbers are used to provide a supplier with a valid purchase order number. The items may be delivered to a warehouse or store against this pre-issued order number. In the Pre-Issue Order Numbers page you can create purchase order numbers immediately or create a schedule to generate purchase order numbers, through a batch process.

Figure 3-9 Pre-Issue Order Numbers Page



Pre-Issue Order Numbers

Generation Schedule

Actions View Add Edit Detach

Supplier Site	SupName	Quantity	Days Until Expiration	Days Between Generation	Next Generate Date	Created By
2200	China General Merch Supplier Site	1,243	23	30	12/11/2016	rms
2220	Canada General Merch Supplier Site	1,500	6	1	12/8/2016	rms
5500	Australia General Merch Supplier Site	500	5	10	12/6/2016	rms

Generate Now Save Save and Close Cancel

Generation Schedule Table

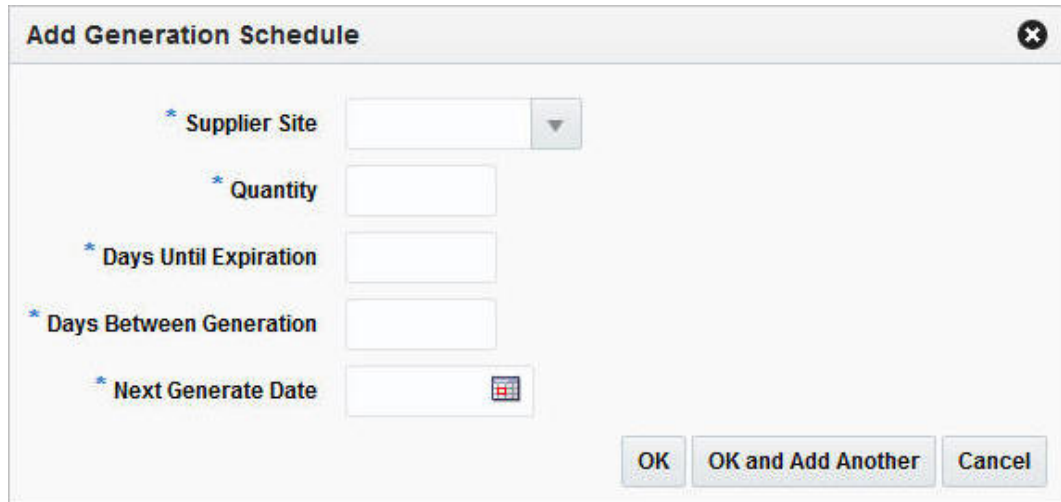
In the Generation Schedule table you can create or delete a schedule, to generate PO numbers by a batch program.

Creating a Schedule for Pre-Issue Order Numbers

To create a schedule to generate pre-issue order numbers, follow the steps below.

1. From the Tasks menu, select **Orders > Pre-Issue Order Numbers**. The Pre-Issue Order Numbers page opens.
2. To create a schedule to generate pre-issue order numbers, select **Actions > Add** or use the Add icon . The Add Generation Schedule page opens.

Figure 3-10 Add Generation Schedule Page



- a. In the **Supplier Site field**, enter, select or search for the supplier site for which you want to create pre-issue order numbers.
- b. In the **Quantity field**, enter the quantity of pre-issue order numbers you want to create.
- c. In the **Days Until Expiration field**, enter the number of days that should elapse between the date each set of pre-issue order numbers is created and the date when the pre-issue order numbers expire.
- d. In the **Days Between Generation field**, enter the days between one generation to the next.
- e. In the **Next Generate Date**, enter the date when this set of pre-issue order numbers should be generated.
- f. Click **OK**, to add the current schedule to the Generation Schedule section and exit the Add Generation Schedule page.

Click **OK and Add Another** to add the current schedule to the Generation Schedule section and create another schedule.

Click **Cancel** to reject all changes and exit the Add Generation Schedule page.

3. After you have entered the information for the pre-issue order numbers, you have the following options.
 - Click **Save**, to save the pre-issue order number schedule and/or pre-issue order number.
 - Click **Save and Close**, to save the pre-issue order number schedule and/or pre-issue order number and exit the Pre-Issue Order Numbers page.
 - Click **Cancel**, to reject all changes and exit the Pre-Issue Order Numbers page.

Generating Order Numbers

To generate a pre-issue order number immediately, follow the steps below.

1. From the Tasks menu, select **Orders > Pre-Issue Order Numbers**. The Pre-Issue Order Numbers page opens.
2. In the toolbar, click **Generate Now**. The Generate Order Numbers Now page opens.
 - a. In the **Supplier Site** field, enter, select or search for the supplier site you want to generate a pre-issue order number for.
 - b. In the **Quantity** field, enter the quantity of pre-issue order numbers you want to generate.
 - c. In the **Days Until Expiration** field, enter the number of days that should elapse between the date, the pre-issue order number is created and the date when the pre-issue order number expires.
 - d. After you have entered the required information, choose one of the following options.
 - Click **OK**, to add the pre-issue order number to the Generation Schedule section and exit the Generate Order Numbers Now page.
 - Click **OK and Add Another**, to add the pre-issue order number to the Generation Schedule section and create another pre-issue order number.
 - Click **Cancel**, to reject all changes and exit the **Generate Order Numbers Now** page.
3. After you have entered the information for the pre-issue order numbers, you have the following options.
 - Click **Save**, to save the pre-issue order number schedule and/or pre-issue order number.
 - Click **Save and Close**, to save the pre-issue order number schedule and/or pre-issue order number and exit the Pre-Issue Order Numbers page.
 - Click **Cancel**, to reject all changes and exit the Pre-Issue Order Numbers page.

Create a Customer Order

**Note:**

Customer Orders may only be created in Merchandising when the application is not configured to integrate with an external order management system.

To create an order for a customer, follow the steps below.

1. From the Tasks menu, select **Orders > Create Order**. The Create Order page opens.

Figure 3-11 Create Order Page

2. In the **Supplier Site** field, enter, select or search for the supplier site. This field is required to create a purchase order.
3. In the **Order Type** field, select Customer Order.
4. In the **Not Before Date** field, enter the date before which the order deliveries are not expected, or use the Calendar icon to select a date.
5. In the **Not After Date** field, enter the date after which the order deliveries are not accepted, or use the Calendar icon to select a date.
6. The **Single Location Order** check box is checked by default, when you create a customer order. You cannot change this entry.
7. In the **Location** type field, the Location Type is set to Store by default, when you create a Customer Order. You cannot change the Location Type. Enter, select or search for the corresponding store location.
8. In the **Import Country** field, enter or select the import country.

 Note:

The **Import Country** field is only available for import orders.

9. In the **Department** field, enter, select or search for the department.
10. After you have entered all information for the customer order, choose one of the following options.
 - Click **OK** to create the customer order and close the Create Order page. The Order page opens in a new tab. Enter the necessary order information. For more details about creating orders, see the [Define/Enter a Purchase Order](#) section. To add Customer Details, see the [Customer Details](#) section.
 - Click **Cancel** to reject all entries and close the Create Order page.

Customer Details

In the Customer Details page you can view, add or edit customer details for the created customer purchase order.

Customer Header

The Customer header section contains the following fields.

Table 3-2 Customer Header Section

Field	Description
Customer	Enter the customer in this field.
Customer Order	This field contains the created Customer Order Number. The Customer Order will be the same as the Order Number of the Customer Order in Merchandising.
Fulfillment	This field contains the Fulfillment Number. The Fulfillment will be the same as the Order Number of the Customer Order in Merchandising.

Billing Information

The Billing Information section contains the following fields. Enter the details for the billing information in this section.

Table 3-3 Billing Information Section

Field/Button	Description
Address	Enter the billing address. This field is a required field.
City	Enter the city. This field is a required field.
State	Enter, select or search for the state.

Table 3-3 (Cont.) Billing Information Section

Field/Button	Description
Postal Code	Enter the postal code of the city.
Country	Enter, select or search for the country. This field is a required field.
Jurisdiction	Enter, select or search for the jurisdiction information. This further breaks down the tax rate if the location is different from the transaction location.
First Name	Enter the first name of the customer.
Phonetic First Name	Enter the customer's phonetic first name.
Last Name	Enter the last name of the customer.
Phonetic Last Name	Enter the customer's phonetic last name.
Company	Enter the company name.
Preferred Name	Enter the preferred name of the billing address.
Phone	Enter the phone number of the billing location.
Copy from Billing Address	The Copy from Billing Address button copies the Billing Address details to the Delivery Information section.

Delivery Information

The Delivery Information section contains the following fields. Enter the details for the delivery information in this section.

Table 3-4 Delivery Information Section

Field/Button	Description
Address	Enter the delivery address. This field is a required field.
City	Enter the city. This field is a required field.
State	Enter, select or search for the state.
Postal Code	Enter the postal code of the city.
Country	Enter, select or search for the country. This field is a required field.
Jurisdiction	Enter, select or search for the jurisdiction information. This further breaks down the tax rate if the location is different from the transaction location.
First Name	Enter the first name of the customer.
Phonetic First Name	Enter the customer's phonetic first name.
Last Name	Enter the last name of the customer.
Phonetic Last Name	Enter the customer's phonetic last name.
Company	Enter the company name.

Table 3-4 (Cont.) Delivery Information Section

Field/Button	Description
Preferred Name	Enter the preferred name of the delivery address.
Phone	Enter the phone number of the delivery location.

Other Information

The Other Information section contains the following fields. Enter additional delivery information in this section.

Table 3-5 Other Information Section

Field	Description
Partial Delivery	This check box is unchecked by default. Note: You cannot change the value of the Partial Delivery field. This field is only enabled when the page is accessed from the Transfer page.
Delivery Date	Enter the delivery date or use the Calendar button to select a date.
Delivery Time	Enter or select the delivery time.
Delivery Charge	This field contains the sum of all charges associated with the delivery of the order.
Currency	Indicates the currency of the order.
Delivery Type	Indicates the delivery type of the order.
Carrier Code	Indicates the carrier the order is shipped with, if specified on the order.
Carrier Service Code	Indicates the method selected for shipping by the customer placing the order. For example, Standard Shipping, Overnight and so on.
Comments	Enter any comments or special instructions that you might want to capture against the customer order. For example, services.

Maintaining Customer Details

To view, add or edit customer details follow the steps below.

1. From the **More Actions** menu of the Order page, select **Customer**. The Customer Details page opens.
2. Add, edit or view the customer details information.
For more information about how to maintain the customer details, see the [Customer Details](#) section.
3. After you have entered all necessary information, choose one of the following options from the Toolbar.
 - Click **Save** to save the entered customer details.

- Click **Save and Close** to save the entered customer details and close the Customer Details page and return to the Order page.
- Click **Cancel** to reject all entries and close the Customer Details page and return to the Order page.

4

Manage Purchase Orders

The Manage Orders option opens the Order Search page. In the Order Search page you can perform the following actions:

- Search for purchase orders by various search criteria
- View the entered search results
- View a purchase order
- Create a purchase order
- Create a purchase order from an existing order
- Edit a purchase order
- Split a purchase order

You can access the Order Search page from the Task menu, select **Orders > Manage Orders**. The Order Search page appears.

The Order Search page contains the following sections:

- Search

For more information about how to search for an order, see the [Searching for an Order](#) section.

- Results

Figure 4-1 Order Search Page

The screenshot displays the 'Order Search' page with a search criteria section and a results table.

Search Criteria:

- Order No.:
- Status:
- Supplier Site:
- Item:
- Location:
- Not Before Date:
- Not After Date:
- Department:
- Class:
- Subclass:

Results Table:

Order No.	Status	Supplier Site	Supplier Site Name	Not Before Date	Not After Date	Terms Description	Total Order Cost	Currency	Currency Primary	Origin
4619	Approved	965922685	Madison Avenue NY supp...	1/22/23	1/24/23	Net 30 Days	1,130.5000	USD	USD	Manually Created
1470287	Approved	131362287	David Avenue SFO suppli...	5/28/23	6/27/23	Net 30 Days	500.0000	USD	USD	Manually Created
1490355	Approved	965922685	Madison Avenue NY supp...	7/5/22	7/5/22	Net 30 Days	850.0000	USD	USD	Manually Created
1490356	Approved	965922685	Madison Avenue NY supp...	7/5/22	7/5/22	Net 30 Days	833.0000	USD	USD	Manually Created
9273	Approved	815373683	Madison Avenue NY supp...	1/19/23	1/21/23	Net 30 Days	1,130.5000	USD	USD	Manually Created
7178	Approved	262532541	Madison Avenue NY supp...	1/19/23	1/21/23	Net 30 Days	1,130.5000	USD	USD	Manually Created

Searching for an Order

To search for an order:

1. From the Task menu, select **Orders > Manage Orders**. The Order Search page appears.
2. You can search for an order using basic or advanced search criteria, depending on the requirement. The basic mode is the default search mode.
 - Click **Advanced** to access the search section in advanced mode.
 - Click **Basic** to return to basic mode.

Searching for an Order Through the Basic Search Criteria

To search for an order using basic search criteria:

1. Enter, select or search for one or all of the following basic search criteria.

Table 4-1 Order Search - Basic Search Criteria and Description

Search Field	Description
Match	Check radio button All or Any. All - only purchase orders matching all entered search criteria are shown. Any - purchase orders matching any of the entered search criteria are shown.
Order No.	Enter the order number.
Status	Select the status of the purchase order, for example, approved.
Supplier Site	Enter or select the supplier site number.
Item	Enter or search for an item.
Location	Enter or select the location for the purchase order.
Not Before Date	Enter the date before which the item will be picked up by the customer or click the Calendar button to select the date.
Not After Date	Enter the date after which the item cannot be picked up by the customer or click the Calendar button to select the date.
Department	Enter, select or search for the department.
Class	Enter, select or search for the class.
Subclass	Enter, select or search for the subclass.

2. Click the Saved Search list to select one of the saved search criteria. Selecting a saved search populates the search section with the saved search criteria. If the run automatically function is enabled for the search, the search is executed immediately.

You can also personalize your saved searches by selecting **Personalize**. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see [Personalize Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

3. Click **Search**. The purchase orders that match the search criteria are displayed in the Results section.
4. Click **Reset** to clear the search section and results.
5. Click **Save As...** to save the current search criteria. The Create Saved Search page appears.

For more information about how to save your search criteria, see [Create Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

6. Click **Done** to close the page.

Searching for an Order Through Advanced Search Criteria

To search for an order using advanced search criteria:

1. To search using advanced search criteria, enter or select one or all of the advanced search criteria.
2. To narrow down the search, use the list next to the search fields. For example, determine if the entered value should equal or not equal the search result.
3. Click the Saved Search list to select one of the saved search criteria. Selecting a saved search populates the search section with the saved search criteria. If the run automatically function is enabled for the search, the search is executed immediately.

You can also personalize your saved searches by selecting **Personalize**. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see [Personalize Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

4. Click **Search**. The purchase orders that match the search criteria are displayed in the Results section.
5. Click **Reset** to clear the search section and results.
6. Click **Save As...** to save the current search criteria. The Create Saved Search page appears.

For more information about how to save your search criteria, see [Create Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

7. Click **Add Fields** to add more fields for the advanced search. To remove the field from the search, click the x right next to the field.
8. Click **Reorder** to change the order of the available search fields. The Reorder Search Fields page appears.
 - Select the desired search field and use the up and down arrows to rearrange the order of the fields.
 - Click **OK** to confirm the new order of the fields and close the page.
 - Click **Cancel** to reject any changes and close the page.
9. Click **Done** to close the page.

Viewing a Purchase Order

To view a purchase order follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive. For more information about the order search function, see the [Searching for an Order](#) section.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. Select a record.
5. Next select **Actions > View**, or use the View icon  in the table toolbar. The Order page opens.
6. To exit the Order page click **Done** or use the Close tab.

Results

The Results section lists the retrieved orders.

Delete a Purchase Order

To delete a purchase order follow the steps below. Only purchase orders holding the status Worksheet and Submitted can be deleted.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Restrict the search to status Worksheet or Submitted. Enter or select further search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the desired order number link. The Order page opens.
5. In the Toolbar, click the **Delete Order icon**.
6. You are prompted, if you want to delete the purchase order.
7. Click **Yes**. The status of the purchase order changes to Closed.
8. Choose one of the following options.
 - Click **Save** to delete the purchase order.
 - Click **Save and Close** to delete the purchase order and exit the Order page.
 - Click **Cancel** to reject your changes and exit the Order page.

Cancel All Items on a Purchase Order

The Cancel All Items option is only available if the order was previously submitted for approval or approved. To cancel all items of a purchase order and close the order follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.

2. Restrict the search to status Submitted or Approved. Enter or select further search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the desired order number link. The Order page opens.
5. In the Toolbar select the Status list and select **Cancel All Items**.
6. You are prompted, if you want to cancel all items of the purchase order.
7. Click **Yes** to cancel all items of the purchase order.
8. The Cancel All Items page opens.
9. In the **Cancel Reason** field, enter or select the reason for cancelling all items on the purchase order.
10. Confirm your entry with **OK**. All the items of the purchase order are cancelled, and the status of the purchase order changes to Closed.
11. After you have cancelled all items on the purchase order, choose one of the following options.
 - Click **Save** to save the purchase order.
 - Click **Save and Close** to save and close the purchase order. The Order page is closed.
 - Click **Cancel** to reject your changes and exit the Order page.

Reinstate All Items of a Purchase Order

If the purchase order holds the status Closed, you can reinstate all items with the Reinstate All Items button. Follow the steps below to reinstate all items of a closed purchase order.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Restrict the search to status Closed. Enter or select further search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the desired order number link. The Order page opens.
5. In the Toolbar select **Reinstate All Items**.
6. You are prompted, if you want to reinstate all the items on the selected purchase order.
7. Click **Yes**. The status of the purchase order changes to Worksheet.
8. After you have reinstated all items on the purchase order, choose one of the following options.
 - Click **Save** to save the purchase order in Worksheet status.
 - Click **Save and Close** to save the purchase order in Worksheet status and exit the Order page.
 - Click **Cancel** to reject your changes and exit the Order page. The purchase order stays closed.

Order Revisions

In the Order Revisions page you can view past changes and accept or reject new changes for an approved purchase order. Changes can be made by the buyer, indicated as Retailer Version or by the supplier, indicated as Supplier Revision. The first version is the original purchase order. Changes are transmitted to and from the supplier through electronic data interchange (EDI). Versions or revisions can only be created for approved purchase orders.

Figure 4-2 Order Revisions Page

Revisions for Order 155010

Order Date Changes

Type	Revision Number	Revision Date	Not Before Date				Not After Date				Pickup Date			
			Old	New	Status	Review	Old	New	Status	Review	Old	New	Status	Review
Retailer Version	1	4/5/21	4/5/21	4/5/21	N/A	N/A	4/5/21	4/7/21	N/A	N/A	4/5/21	4/7/21	N/A	N/A
Supplier Revision	1	4/4/21	4/5/21	4/5/21	N/A	N/A	4/5/21	4/7/21	Accepted		4/5/21	4/7/21	Accepted	
Retailer Version	0	4/4/21	4/5/21	4/5/21	N/A	N/A	4/5/21	N/A	N/A		4/5/21	N/A	N/A	

Cost and Quantity Changes

Item	Description	Location Type	Location	SGP	Ordered Quantity				Order Cost			
					Old	New	Status	Review	Old	New	Status	Review
*151550546	TEST ITEM	Store	1111	EA	5	2	Accepted		12.0000	10.0000	Accepted	
*151550577	151550577	Store	1111	EA	10	5	Rejected		100.0000	110.0000	Rejected	
*152155034	neg	Store	1111	EA	6	3	Accepted		14.0000	15.0000	Accepted	

Order Date Changes

The Order Date Changes section displays the following changes:

- Old and New Not Before Date, date before which the order deliveries are not expected.
- Old and New Not After Date, date after which the order deliveries are not accepted.
- Old and New Pickup Date, date when the item will be picked up.

Cost and Quantity Changes

The Cost and Quantity Changes section displays the following changes:

- Old and New Ordered Quantity
- Old and New Order Cost

Viewing an Order Revision

To view an order revision follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.

2. Search for and retrieve a purchase order. Restrict the search to purchase order in Approved or Closed status. Click **Search**. The search results are shown in the Results section.
3. In the Results section, select a record.
4. Next select **Actions > View**. The Order page opens.
5. In the Toolbar, select **More Actions > Order Revisions**.
6. The Order Revisions page opens. You can view all past order date, cost and quantity changes for the selected purchase order.

 Note:

Merchandising displays the latest changes at the top of the list, followed by the revision number in descending order.

7. Click **Done** or use the Close Tab icon to close the Order Revisions page.

Accepting an Order Revision

To accept changes for an approved purchase order follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Search for and retrieve a purchase order. Restrict the search to purchase orders in Approved status. Click **Search**. The search results are shown in the Results section.
3. In the Order No. column, click the order number link, or mark a record and select **Actions > Edit** or use the Edit icon . The Order page opens.
4. In the Toolbar select **More Actions > Order Revisions**.
5. The Order Revisions page opens. All Order Dates as well as Cost and Quantity Changes are displayed.
6. Click the **Accept** icon  in the Review column of each change you want to accept provided they are in Pending status. The Accept icon will be available only for supplier revisions and if there is a change to accept. If you want to accept all of the changes, highlight the entire row, and click **Accept All**.

 Note:

The **Accept All** button is only enabled, if there are pending changes for the selected purchase order available.

7. After you have accepted the desired changes, you have the following options.
 - Click **Save** to save the accepted changes.
 - Click **Save and Close** to save the accepted changes and close the Order Revisions page.
 - Click **Cancel** to reject all changes and close the Order Revisions page.

Rejecting an Order Revision

To reject changes for an approved purchase order follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Search for and retrieve a purchase order. Restrict the search to purchase orders in Approved status. Click **Search**. The search results are shown in the Results section.
3. In the Order No. column, click the order number link, or mark a record and select **Actions > Edit** or use the Edit icon . The Order page opens.
4. In the Toolbar select **More Actions > Order Revisions**.
5. The Order Revisions page opens. All Order Dates as well as Cost and Quantity Changes are displayed.
6. Click the **Reject** icon  in the Review column of each change you want to reject provided they are in Pending status. The Reject icon will be available only for supplier revisions and if there is a change to reject. If you want to reject all of the changes, highlight the entire row, and click **Reject All**.

Note:

The **Reject All** button is enabled only if there are pending changes for the selected purchase order available.

7. After you have rejected the desired changes, you have the following options.
 - Click **Save** to save the rejected changes.
 - Click **Save and Close** to save the rejected changes and close the Order Revisions page.
 - Click **Cancel** to reject all changes and close the Order Revisions page.

Split an Order

You can split order quantities for an item across suppliers in Merchandising. Follow the steps below to split the order quantities of your order.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. Select a record in the Results section.
5. Select **Actions > Split Orders**, the Split by Supplier page opens.
6. Click **Actions > Add** or use the Add icon, to add an additional supplier.

7. To remove the supplier, click **Delete** to remove the primary supplier from the table.
8. In the **Supplier Site** field, enter, select or search for the supplier ID.
9. In the **Country of Sourcing** field, enter, select or search for the country of sourcing ID.
10. In the **Unit Cost** field, enter the unit cost for the item.
11. In the **Order Quantity**, enter the quantity of the item for the selected supplier site.
12. After you have entered the supplier site information, choose one of the following options.
 - Click **OK** to save your changes.
 - Click **OK and Add Another** to enter an additional supplier site.
 - Click **Cancel** to reject all changes and exit the Add Supplier Site page.

 Note:

If the Recommended Order Quantity does not equal the Actual Order Quantity, a warning message appears. Click **Yes** to continue, or **No** to return to the Split Supplier page and correct the order quantity.

Appointments

Appointments define the quantity of goods that are expected to ship from one location to another. The appointments are created in the warehouse management system and sent to Merchandising. When a shipment is received, the warehouse management system sends a message to Merchandising Receiving and completes the following actions:

- The appointment status changes to Closed
- **Quantity Received** and **Receipt Number** fields are updated
- Merchandising attempts to close the document associated with the appointment (a purchase order, transfer, or allocation)

A purchase order, transfer, or allocation cannot be closed if an associated appointment does not have a status of **Closed**. Also, the line item order quantity (canceled quantity) cannot fall below the total expected quantity for all of the shipments and appointments that are attached to the order for that line item.

Viewing Appointments

The Appointments page allows you to search for any appointment linked with a specific order or ASN and view its details such as the receiving location and current status.

The Appointments page can be accessed by any of the following ways:

- From the Tasks menu, select **Inventory > Shipments and Receipts > Appointments**. The Appointment page opens.
- From the More Actions menu of the following pages:
 - Order

For more information about orders, see the [Create a Purchase Order](#) chapter, section "Define/Enter a Purchase Order".

- Transfer

For more information about transfers, see [Transfer Page](#) in the *Oracle® Retail Merchandising Inventory User Guide*.

- Transfer Details

For more information about transfer details, see [Transfer Details](#) in the *Oracle® Retail Merchandising Inventory User Guide*.

- In the Order Details page, select **Actions > Appointments** in the Items section.

For more information about order details, see the [Create a Purchase Order](#) chapter, section "[Order Details](#)".

- In the Shipment page, select the **Appointment** button in the toolbar.

For more information about shipments, see [Shipment](#) in the *Oracle® Retail Merchandising Inventory User Guide*.

The Appointments page includes the following sections:

- Search

For more information about how to search for appointments, see the [Searching for an Appointment](#) section.

- Results

- Details

Figure 4-3 Appointments Page

Searching for an Appointment

You can search for appointments by providing search criteria in the search section.

1. You can search for an appointment using basic or advanced search criteria, depending on the requirement. The basic mode is the default search mode.
 - Click **Advanced** to access the search section in advanced mode.
 - Click **Basic** to return to the basic mode.

Searching for an Appointment Through the Basic Search Criteria

To search for an appointment through the basic search criteria:

1. Enter or select one or all of the following basic search criteria.

Table 4-2 Appointment Search - Basic Search Criteria

Search Field	Description
Match option	Check radio button All or Any. All - only appointments matching all entered search criteria are shown. Any - appointments matching each entered search criteria are shown.
Appointment	Enter, select or search for the appointment ID.
Status	Select the status of the appointment. The options are: Scheduled, Modified, Arrived, and Closed.
Order No.	Enter, select or search for the order number.
Transfer	Enter, select or search for a transfer.
Allocation	Enter, select or search for an allocation number.
Store	Enter, select or search for the store.
Warehouse	Enter, select or search for the warehouse.
Internal Finisher	Enter, select or search for the internal finisher..
External Finisher	Enter, select or search for the external finisher.
ASN	Enter, select or search for an ASN number.

2. You can also click the Saved Search drop down to select one of the saved sets of search criteria. Selecting a saved search will populate the criteria section with saved criteria. If the saved search is selected to run automatically then the search will be executed too.

You can also choose to manage and personalize the saved searches by clicking Personalize in the list. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see [Personalize Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

3. Click **Search**. The appointments that match the search criteria are displayed in the Results section.
4. Click **Reset** to execute the saved search.
5. Click the **Save..** button to save the current sets of search criteria as a Saved Search. The Create Saved Search page appears.

For more information on the Create Saved Search, see [Create Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

6. Click **Done** to close the page.

Searching for an Appointment Through the Advanced Search Criteria

To search for an appointment through the advanced search criteria:

1. Enter or select one or all of the advanced search criteria.

Figure 4-4 Appointment Search - Advanced Search Mode

2. To narrow down the search, use the list next to the search fields. For example, determine if the entered value should equal or not equal the search result.
3. Click on the Saved Search list to select one of the saved search criteria. Selecting a saved search populates the search section with the saved search criteria. If the run automatically function is enabled for the search, the search is executed immediately.

You can also personalize your saved searches by selecting **Personalize**. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see [Personalize Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

4. Click **Search**. The appointments that match the search criteria are displayed in the Results section.
5. Click **Reset** to clear the search section and results.
6. Click **Save As...** to save the current search criteria. The Create Saved Search page appears.
For more information about how to save your search criteria, see [Create Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.
7. Click **Add Fields** to add more fields for the advanced search. To remove the field from the search, click the x right next to the field.
8. Click **Reorder** to change the order of the available search fields. The Reorder Search Fields page appears.
 - Select the desired search field and use the up and down arrows to rearrange the order of the fields.
 - Click **OK** to confirm the new order of the fields and close the page.
 - Click **Cancel** to reject any changes and close the page.
9. Click **Done** to close the page.

Results

The Results section lists the appointments that match the entered search criteria. Select an appointment to view the details.

Details

In the Details section you can view the item on this appointment along with the appointed and received quantities based on the related document, purchase order or ASN.

Order Shipments

The Shipment List page displays shipping details for purchase order shipments and franchise shipments, when accessed through the order pages. Three different ways to access the Shipment List are available.

1. From the Tasks menu, select **Orders > Manage Orders** (Search for the order)> **More Actions > Shipments**. The Shipment List opens.

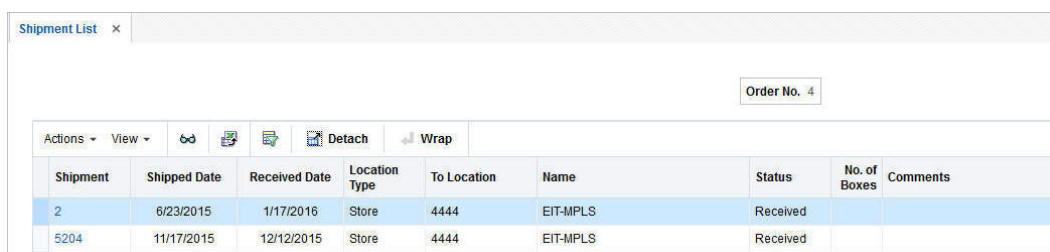
You can also access the Shipment List for vendor sourced franchise orders.

- From the Tasks menu, select **Inventory > Franchise Orders > Manage Franchise Orders**. The Franchise Order Search page appears. Search for the franchise order.
- In the Results section click the franchise order link, or mark a record and select **Actions > Edit/View**. The Franchise Order page appears.
- Then select **More Actions > Shipments**. The Shipment List page opens.

Additionally, you can access the Shipment List for franchise returns.

- From the Tasks menu, select **Inventory > Franchise Orders > Manage Franchise Returns**. The Franchise Return Search page appears. Search for the franchise return.
- In the Results section click the RMA (Return Merchandise Authorization) link, or mark a record and select **Actions > Edit/View**. The Franchise Return page appears.
- Then select **More Actions > Shipments**. The Shipment List page opens.

Figure 4-5 Shipment List Page



Shipment	Shipped Date	Received Date	Location Type	To Location	Name	Status	No. of Boxes	Comments
2	6/23/2015	1/17/2016	Store	4444	EIT-MPLS	Received		
5204	11/17/2015	12/12/2015	Store	4444	EIT-MPLS	Received		

The Shipment List contains the following information:

- Shipment number

- Shipped Date
- Received Date
- Location Type, for example, Store or Warehouse
- To Location
- Name, name of the location
- Status, for example, Submitted.
- No. of Boxes
- Comments

To open the Shipment page and view further shipment details follow one of the options below.

- In the Shipment List page, go to column Shipment and click the shipment number link. The Shipment page opens. For more information about shipment details, see [Shipment](#) in the *Oracle® Retail Merchandising Inventory User Guide*.
- In the Shipment List page, select **Actions > View** or use the View icon. The Shipment page opens. For more information about shipment details, see [Shipment](#) in the *Oracle® Retail Merchandising Inventory User Guide*.

2. Click **Done** to exit the Shipment List.

Work Orders for Purchase Orders

Work Orders are requests for certain activities to be done to an item in a warehouse before the delivery of an item to the final locations.

The Work Order page allows you to view or maintain one or more work orders for the purchase order. Next you assign work in progress codes (WIP) and indicate in which sequence the task must be completed.

The Work Orders page contains the following sections.

- [Work Orders for Order No. Table](#)
- [Item/Locations Table](#)
- [Work In Progress Codes Table](#)

Figure 4-6 Work Order Page

Work Orders for Order No. 34106

Item	Description	Location	Location Name
100600732	100500587 BLACK SIZE 7:formal	123456799	FP Testing

Work In Progress Codes

WIP Code	Description
KIT	Killing

Work Orders for Order No. Table

The Work Orders for the Order No. table displays all work orders associated with the current purchase order.

Item/Locations Table

The Item/Locations table displays items and locations associated with the work order. The items and locations are populated automatically.

Work In Progress Codes Table

The Work In Progress (WIP) Codes Table holds the WIP codes assigned to the item locations on the work order.

Creating Work Orders

To create a work order, follow the steps below.



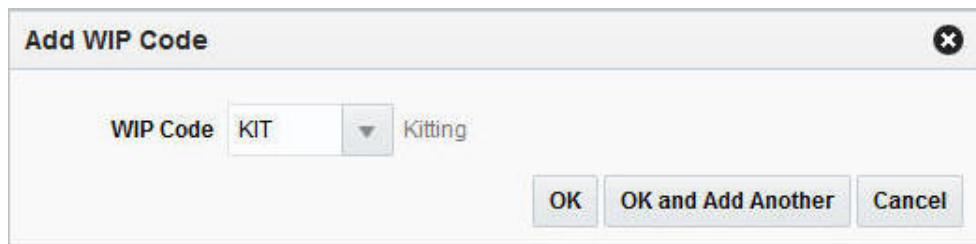
Note:

The system displays already existing work orders, if you add a new work order. However, you cannot modify existing work orders during the creation of a new work order.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Order page opens.
5. Select **More Actions > Work Order > Create**. The Order Distribution page opens.
6. In the table click **Actions > Work Orders** or use the **Work Orders** button. The Work Orders page opens.
7. In the Work in Progress Codes table, select **Actions > Add WIP Code**, or use the Add icon . The Add WIP Code page opens.

Figure 4-7 Add WIP Code Page



8. Select, enter or search for the WIP code, for example, quality control.
 - Click **OK** to add the selected WIP code to the Work In Progress Code section.
 - Click **OK and Add Another** to add the current WIP code and create another.
 - Click **Cancel** to reject the WIP entry and exit the Add WIP page.
9. To save or reject the created work order, choose one of the following options.
 - Click **Save** to save the created work order.
 - Click **Save and Close** to save the created work order and exit the Work Orders page. The Order Distribution page is displayed without the item/locations that were associated to the new work order.
 - Click **Cancel** to reject all entries and close the Work Orders page.

Managing Work Orders

To edit a work order, follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link or select **Actions > Edit**, or use the Edit icon . The Order page opens.

5. Select **More Actions > Work Order > Manage**. The Work Orders page opens. The work orders for the selected purchase order are displayed. Choose one of the following options.
 - [Deleting a Work Order](#)
 - [Deleting an Item/Locations Combination](#)
 - [Deleting a WIP Code](#)
 - [Adding a WIP Code](#)

Deleting a Work Order

To delete a work order, follow the steps below.

1. In the Work Orders for Orders No. table, select a record.
2. Then select **Actions > Delete** or use the Delete icon  to delete a work order from a purchase order.
3. A confirmation prompt is displayed. Select **Yes** to confirm the prompt. The work order is deleted from the purchase order.

Note:

The Work Orders page will close automatically, after you select **Yes** to confirm the deletion of the last work order for the purchase order.

4. To save or reject your changes, choose one of the following options.
 - Click **Save** to save your changes.
 - Click **Save and Close** to save your changes and exit the Work Orders page.
 - Click **Cancel** to reject all entries and close the Work Orders page.

Deleting an Item/Locations Combination

To delete an item/locations combination from the work order, follow the steps below.

1. In the Item/Locations table, select a record.
2. Then select **Actions > Delete** or use the Delete icon  to delete the item/locations combination from the purchase order.
3. A confirmation prompt is displayed. Select **Yes** to confirm the prompt. The item/locations combination is deleted from the purchase order.

Note:

You are not allowed to delete the last item/locations combination of a work order. You have to delete the whole work order instead. For more information about how to delete a work order, see the [Deleting a Work Order](#) section.

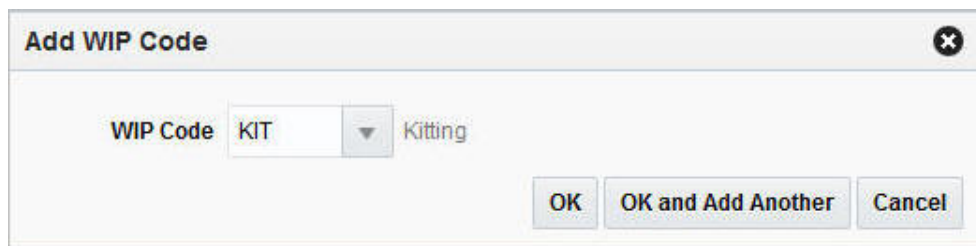
4. To save or reject your changes, choose one of the following options.
 - Click **Save** to save your changes.
 - Click **Save and Close** to save your changes and exit the Work Orders page.
 - Click **Cancel** to reject all entries and close the Work Orders page.

Adding a WIP Code

To add a WIP code to the work order, follow the steps below.

1. In the Work in Progress Codes section, select **Actions > Add WIP Code**, or use the Add icon . The Add WIP Code page opens.

Figure 4-8 Add WIP Code Page



2. Select, enter or search for the WIP code, for example, quality control.
 - Click **OK** to add the selected WIP code to the Work In Progress Code section.
 - Click **OK and Add Another** to add the current WIP code and create another.
 - Click **Cancel** to reject the WIP entry and exit the Add WIP page.
3. To save or reject your changes, choose one of the following options.
 - Click **Save** to save your changes.
 - Click **Save and Close** to save your changes and exit the Work Orders page.
 - Click **Cancel** to reject all entries and close the Work Orders page.

Viewing Work Orders

To view a work order, follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Results section, select a record.
5. Next select **Actions > View** or use the View icon . The Order page opens.
6. Select **More Actions > Work Order > Manage**. The Work Orders page opens. All work orders associated with the selected purchase order are displayed.

7. Click **Done** to exit the Work Orders page.

Deleting a WIP Code

To delete a WIP code from the work order, follow the steps below.

1. In the WIP Codes table, select a record.
2. Then select **Actions > Delete** or use the Delete icon  to delete the WIP code from the purchase order.
3. A confirmation prompt is displayed. Select **Yes** to confirm the prompt. The WIP code is deleted from the purchase order.
4. To save or reject your changes, choose one of the following options.
 - Click **Save** to save your changes.
 - Click **Save and Close** to save your changes and exit the Work Orders page.
 - Click **Cancel** to reject all entries and close the Work Orders page.

Deal Summary

In the Deal Summary page you can view deals with transaction level discounts that apply to a purchase order. The screen provides details on the order discount, item/location discount and the total discount.

To view a deal summary follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link or select **Actions > Edit/View**, or use the corresponding icons. The Order page opens.
5. In the Toolbar, select **More Actions > Deal Summary**.
6. The Deal Summary page opens. The header section displays the selected order number, the total discount amount and the currency. The bottom section contains deal details, such as deal component, discounts on item/location level as well as on the order level.

Note:

If the selected order has a different currency than the system's primary currency, Merchandising also displays the field Total Discount Primary. This field displays the total discount amount in the system's primary currency.

If the currency of the selected order has the same currency than the system's primary currency, only the Total Discount field is displayed.

7. Click **OK** to exit the Deal Summary page and return to the Order page.

Order Discounts

The Order Discounts page displays deal information that apply to an item on a purchase order.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Search for and retrieve a purchase order. Enter or select the corresponding search criteria and click **Search**. The search results are displayed.
3. In the Results section, go to column Order No. and click the order number link. The Order page opens.
4. In the Toolbar click the **Details** button. The Order Details page opens.
5. In the Location section, select **Actions > Discounts**. The Order Discount page opens. The header section shows the item location information for the selected order, such as order number, Unit of purchase (UOP), currency, item, location, supplier site cost, total discount and order cost. The bottom section displays deal details, such as deal components (discounts or rebates), deal class, discount type and graduated order cost.

 Note:

Use the **More Actions** button to toggle from one currency to another.

6. Click **Done** to exit the Order Discounts page.

View Replenishment Orders

Inventory Management

The Order Inventory Maintenance page allows you to maintain and view inventory management information for purchase orders, for items on a purchase order, and for locations on a purchase order.

You can view the following inventory management information:

- Purchase order quantities before and after scaling
- Net cost of the purchase order before and after scaling
- Due order processing parameters for replenishment orders

You can edit the following inventory management information:

- Purchase order scaling
- Minimum constraints
- Truck splitting
- Supplier Pooling
- Order Quantity

The Order Inventory Management page contains the following sections.

- Order Header

The header displays the order number, item, location and order costs.

 Note:

The fields **Item** and **Location** are only displayed if you enter the Order Inventory Management page through Order Details.

- Scaling Constraints

For more information about the scaling constraints, see the [Maintaining Scaling Constraints](#) section.

- Minimum Constraints

For more information about the minimum constraints, see the [Maintaining Minimum Constraints](#) section.

- Truck Splitting Constraints

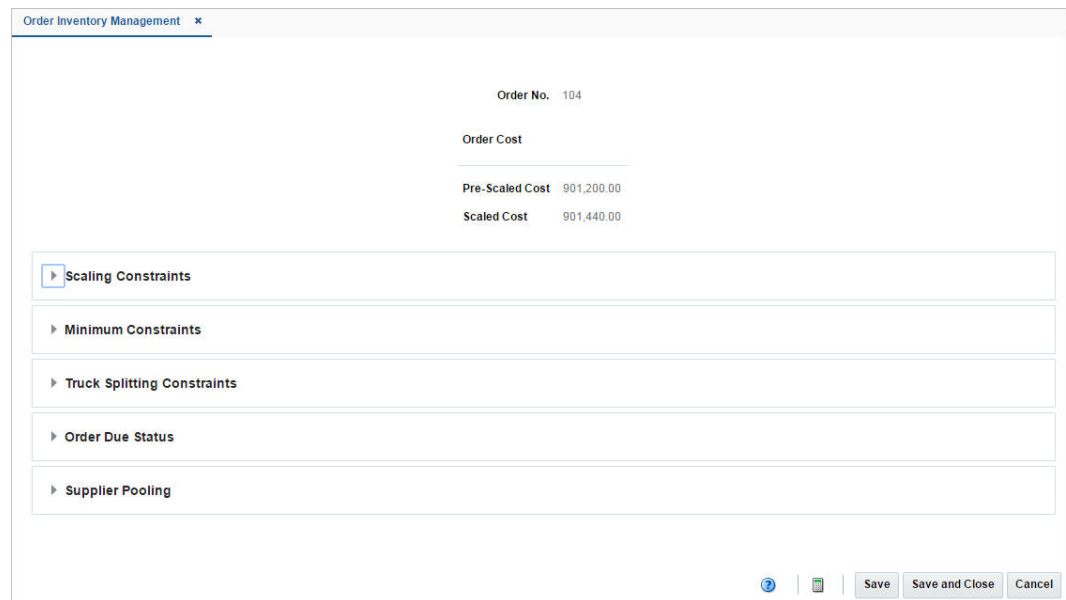
For more information about the truck splitting constraints, see the [Maintain Truck Splitting Constraints](#) section.

- [Order Due Status](#)

- Supplier Pooling

For more information about the supplier pooling, see the [Maintaining Supplier Pooling](#) section.

- Figure 4-9 Order Inventory Management Page**



Order Inventory Management x

Order No. 104

Order Cost

Pre-Scaled Cost 901,200.00

Scaled Cost 901,440.00

Scaling Constraints

Minimum Constraints

Truck Splitting Constraints

Order Due Status

Supplier Pooling

Save Save and Close Cancel

Maintaining Order Inventory Information for a PO at the Order, Item, or Location Level

To maintain inventory information of a purchase order follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page appears.
2. Restrict the search to purchase order in Worksheet status.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link or select **Actions > Edit**, or use the Edit icon . The Order page appears.
 - To apply inventory management details to the entire **purchase order**:
In the Toolbar select **More Actions > Inventory Management**. The Order Inventory Management page appears.
 - To apply inventory management details to an **item on the purchase order**:
 - In the Toolbar select **Details**. The Order Details page appears.
 - In the Items section, select an item. Then select **Actions > Inventory Management**. The Order Inventory Management page appears.
 - To apply inventory management details to an **item and location on the purchase order**:
 - In the Toolbar select **Details**. The Order Details page appears.
 - In the Locations section, select an location. Then select **Actions > Inventory Management**. The Order Inventory Management page appears.

Maintaining Scaling Constraints

To maintain the scaling constraints, follow the steps below.

1. In the Scaling Constraints area, select the **Scale Order to Constraints** check box. The Scaling Constraints area is enabled.
2. In the **Objective** field, select whether purchase orders are scaled to the minimum or maximum values of the scaling constraints.
3. In the **Maximum Iterations** field, enter the maximum number of times that the scaling process is performed for the purchase order.
4. In the **Level** field, select the level at which the scaling is performed. For example, select order or location level.
5. In the Scaling Constraints Primary column, edit the following fields:
 - **Type**: Enter or select the primary type of constraint to use when scaling orders. For example, Amount or Each.
 - **UOM**: If you select, Mass or Volume as the primary type, edit the unit of measure (UOM) code. Enter, select or search for the UOM.

- **Maximum Value:** Edit the maximum value of the constraint. If you select Amount as the primary type, the currency is displayed next to this field.
 - **Tolerance:** Edit the percentage tolerance for the minimum value of the constraint.
 - **Minimum Value:** Edit the minimum value of the constraint. If you select Amount as the primary type, the currency is displayed next to this field.
 - **Tolerance:** Edit the percentage tolerance for the maximum value of the constraint.
6. In the Scaling Constraints Secondary column, edit the following fields:
- **Type:** Select the secondary type of constraint to use when scaling orders.

 Note:

The Secondary Type cannot be the same as the Primary Type.

- **UOM:** If you select, Mass or Volume as the secondary type, edit the UOM code. Enter, select or search for the UOM.
 - **Maximum Value:** Edit the maximum value of the constraint. If you select Amount as the secondary type, the currency is displayed next to this field.
 - **Tolerance:** Edit the percentage tolerance for the minimum value of the constraint.
 - **Minimum Value:** Edit the minimum value of the constraint. If you select Amount as the secondary type, the currency is displayed next to this field.
 - **Tolerance:** Edit the percentage tolerance for the maximum value of the constraint.
7. **Quantities:** Displays the primary and secondary pre-scaled and scaled quantities.
8. **Vehicle Information:**
- The **Multiple Trucks** checkbox determines if an order should be scaled to one or multiple trucks. Select the checkbox to indicate that the order should be scaled to multiple trucks.
 - The **Number of Trucks** field contains the number of trucks required for the order.
9. **Issues:** Displays any issues that were encountered during the order scaling process.

Maintaining Minimum Constraints

To maintain the minimum constraints, follow the steps below.

1. In the **Level** field, select the level at which the minimum order requirements of the supplier must be met.
2. When you define two minimum order requirements, select the relationship between the requirements in the **Conjunction** field.
3. In the Minimum 1 column, complete the following fields:
 - **Type:** Select how the first minimum order requirement is expressed.
 - **UOM:** If you select Mass or Volume as the primary type, edit the UOM code. Enter, select or search for the UOM.
 - **Value:** Edit the value of the first minimum order requirement of the supplier. If you select Amount as the first minimum, the currency is displayed next to the field.

4. In the Minimum 2 column, complete the following fields:
 - **Type:** Select how the second minimum order requirement is expressed.

 Note:

The Minimum 2 Type cannot be the same as the Minimum 1 Type.

- **UOM:** If you select Mass or Volume as the secondary type, edit the UOM code. Enter, select or search for the UOM.
 - **Value:** Edit the value of the first minimum order requirement of the supplier. If you select Amount as the second minimum, the currency is displayed next to the field.
5. **Quantities:** Displays the primary and secondary pre-scaled and scaled quantities.

Maintain Truck Splitting Constraints

To maintain truck splitting constraints, follow the steps below.

1. In the Truck Splitting Constraints section, select the **Split Order into Truckloads** check box. The Truck Splitting Constraints area is enabled.
2. In the **Truck Split Method** field, select the desired method from the list.
3. In the Constraint 1 column, complete the following fields:
 - **Type:** Select the primary type of constraint to use when splitting orders into truckloads.
 - **UOM:** If you select Mass or Volume as the primary type, edit the UOM code. Enter, select or search for the UOM.
 - **Value:** Edit the value of the constraint.
 - **Tolerance:** Edit the percentage tolerance for the maximum value of the constraint.
4. In the Constraint 2 column, complete the following fields:
 - **Type:** select the primary type of constraint to use when splitting orders into truckloads.

 Note:

The Constraint 2 Type cannot be the same as the Constraint 1 Type.

- **UOM:** If you select Mass or Volume as the secondary type, edit the UOM. Enter, select or search for the UOM.
 - **Value:** Edit the value of the constraint.
 - **Tolerance:** Edit the percentage tolerance for the maximum value of the constraint.
5. **Quantities:** Displays the primary and secondary pre-scaled and scaled quantities as well as the number of trucks.

6. **Issues:** Displays any issues that were encountered during the split order process.

Order Due Status

This section displays the following fields.

- **Order Due** checkbox
This checkbox determines if the Due Order Processing will be used when creating orders for the supplier or supplier/department. The checkbox is only used for replenishment orders.
- **Estimated Stock Out**
- **Accepted Stock Out**
- **Service Basis**
- **Due Order Processing** checkbox
This checkbox determines if the Due Order Processing will be used when building the order. It is only used for replenishment orders.
- **Item Locations Due**
- **Due Order Level**

Maintaining Supplier Pooling

To maintain the supplier pooling, follow the steps below.

1. In the **Supplier Site** field, enter, select or search for the supplier site.
2. In the **File ID** field, enter, select or search for the file ID.

Recalculating Quantities

After you have entered all constraints, follow the steps below:

1. Click the Recalculate icon  to recalculate the quantities.

Note:

When an order must be recalculated, a corresponding message is displayed.

2. Then choose one of saving options from the Order Inventory Management Toolbar.

Viewing Order Inventory Management Information

To view inventory management information follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page appears.
2. Restrict the search to purchase order in Worksheet status.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.

4. In the Results section, select a record.
5. Next select **Actions > View**. The Order page appears.
 - To view inventory management details to the entire **purchase order**:
In the Toolbar select **More Actions > Inventory Management**. The Order Inventory Management page appears.
 - To view inventory management details to an **item on the purchase order**:
 - In the Toolbar select **Details**. The Order Details page appears.
 - In the Items section, select an item. Then select **Actions > Inventory Management**. The Order Inventory Management page appears.
 - To view inventory management details to an **item and location on the purchase order**:
 - In the Toolbar select **Details**. The Order Details page appears.
 - In the Locations section, select an location. Then select **Actions > Inventory Management**. The Order Inventory Management page appears.
6. The inventory management information for the selected purchase order is displayed.
7. Click **Done** to close the Order Inventory Management page.

Redistribute Items on a Purchase Order

In the Order Redistribution page you can select the items on a purchase order which you want to redistribute. You can redistribute items on a purchase order as long as the purchase order is in the Worksheet or Approved status, the items have not been received, there are no associated contracts, no advance shipment notifications (ASN) have been received, and none of the items have an associated appointment or allocation.

To redistribute items on a purchase order follow the steps below.

1. From the Tasks menu, select **Orders > Manage Orders**. The Order Search page opens.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The orders that match the search criteria are displayed in the Results section.
4. In the Order No. column, click the order number link or select **Actions > View**. The Order page opens in a new tab.
5. In the Toolbar, click **Details**. The Order Details page opens in a new tab.
6. Click **Redistribute**. The Order Redistribution page opens.

Figure 4-10 Order Redistribution Page

7. Select **Actions** > **Add** or use the Add icon  to add an item to the redistribution list. The Add Items page opens.
8. In the Item type field, select the type of item.
9. Enter or search for the item/item parent.
10. After you have selected the item/item parent, choose one of the following options.
 - Click **OK** to exit the Add Item page and add the current item to the Order Redistribution page.
 - Click **OK and Add Another** to add the current item Order Redistribution page and add further items.
 - Click **Cancel** to reject the item and exit the Add Item page.
11. In the Order Redistribution page select **OK**.
12. A confirmation prompt to re-apply the following entries for the selected item after the redistribution is shown.
 - Expenses
 - Deals
 - Order scaling
 - Work orders
13. Confirm the prompt with **Yes**. The system opens the Order Distribution page.
 - If you select **No**, the system returns to the Order Redistribution page.
14. Go to the Distribute By section. Open the Redistribution list.
15. Select if you want to redistribute the selected item/item parent by Location or by Store Grade.

If you choose by Location, the Distribute by Location page opens. For further details, see the [Distributing Items by Location](#) section.

If you choose by Store Grade, the Distribute by Store Grade page opens. For further details, see the [Distributing Items by Store Grade](#) section.

After you have entered all necessary information, you will return to the Order Distribution page.

16. Click **Save and Close** to save your changes and close the Order Distribution page. The system returns to the Order Details page. Verify, if the items/item parent were added to the Items section with the appropriate quantity.

Manage Open To Buy Budgets

Open to Buy (OTB) is a budgetary number that indicates how much money is open to spend on purchasing new merchandise from a supplier in a period. Merchandising supports holding OTB at the subclass/week level and can support splitting this budget into three types of orders - Non-Basic (N/B), Buyer Basic (BRB) and Auto Basic (ARB) orders. When purchase orders are approved they will draw down on this budget based on the order type associated with the order. For example, manually created orders default to using the N/B order type; whereas replenishment generated orders use the ARB type.

OTB is typically determined in planning and integrated to Merchandising via integration. However, for visibility in Merchandising or for situations where the planning solution doesn't support integration or where planning generates open to buy figures at a level different than is used in Merchandising, the spreadsheet download and upload processes can be used. This functionality is accessed from the main Merchandising task list under Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data.

To add or update OTB budgets, select the template type of Budgets from the Download Data screen and then the template Open to Buy. Optionally you can also select a department to download just that department's budgets. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice. Note: OTB budgets cannot be deleted using this functionality.

Add OTB Budgets

To add a new budget entry, select the action type of Create on the OTB Budget tab. Next enter the department, class, and subclass IDs in the appropriate columns. All budgets are held by week in Merchandising, so the next column holds the last day of the week for which the budget applies. The date must be entered in the 'DD-MON-YYYY' format. Lastly, enter the budget details for one or all three of the budget columns - Non Basic Allocations, Auto Basic Allocations, and Buyer Basic Allocations. These values should be entered in terms of either cost or retail, depending on the OTB setting for the indicated department.

Update OTB Budgets

If you would like to update the budget information for a subclass/week, then a similar process will be followed to that described above for entering new budgets. First, download the spreadsheet, and then find the subclass/week combination that you want to update. In that row select the action type of Update, and then update the one or more of the budgets in the spreadsheet.

Uploading Changes

For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and select Foundation Data > Upload Foundation Data from the main task list. In this screen, you'll again select the template type Budgets and the template Open to Buy. This will generate a process description automatically, but this can be updated if desired. Lastly, select the Browse button and navigate to the directory where you saved the updated spreadsheet.

To review the status of the upload and check whether any errors occurred, select the Foundation Data > Review Status task from the main task list.

See also [Download/Upload Data from Spreadsheets](#) and [View Data Loading Status](#).

Review Purchase Orders using the Order Review Page

The Order Review page allows you to review and approve orders. The primary purpose of the screen is for reviewing replenishment generated orders which failed one or more validations upon approval, but all orders can be reviewed in this page. To aid you in finding desired orders, the purchase orders displayed can be filtered based on entered criteria along with selection of one of the report tabs. Report tabs are configured in the Report Options screen. These report tabs filter orders based on the configured error or error category assigned to the tab. You can select an order and view summary information or navigate to a detail page where errors can be reviewed in more detail, quantities can be adjusted and you can attempt to re-approve the order once adjusted.

- [Searching for Orders on the Order Review Page](#)
- [Order Review Page – Tabs](#)
- [Order Review Page – Order Report](#)
- [Order Review Summary Page](#)
- [Order Review Detail Page](#)

Searching for Orders on the Order Review Page

The Order Review search includes multiple criteria for searching for Orders. Perform the following procedure to search for orders.

1. From the Task menu, select **Orders > Order Review**. The Order Review page appears.
2. From the Order Review page, click the filter icon.



The Filters panel appears.

3. Enter, select or search for one or all of the following search criteria.

Table 4-3 Order Review Search Criteria and Description

Search Field	Description
Status	Enter the Order Status you wish to use for your search. Valid values include: • Worksheet • Submitted • Approved • Closed  Note: Multi-select is allowed.
Supplier Site	Enter the Supplier Site(s) you wish to use for your search. The Supplier Site filter is a concatenation of the Supplier Site Name and the Supplier Site ID. For example: Acme Supplies, LTD – 1234567
Written Date	Enter a date or a date range to compare against the date the order was created. The To Date will default to the From Date to facilitate searching on a single date. However, if the To Date is removed, the search will return orders with a Written Date greater than or equal to the From Date. If the From Date is left blank with the To Date populated, the search will return orders with a Written Date less than or equal to the To Date. When both From Date and To Date are provided, the Written Date must be within the date range (inclusive). Therefore, orders with a Written Date which is greater than or equal to the From Date, and less than or equal to the To Date will be returned. To Date must be greater than or equal to the From Date.

Table 4-3 (Cont.) Order Review Search Criteria and Description

Search Field	Description
Not Before Date	Enter a date or a date range to compare against the Not Before Date on the order. The To Date will default to the From Date to facilitate searching on a single date. However, if the To Date is removed, the search will return orders with a Not Before Date greater than or equal to the From Date. If the From Date is left blank with the To Date populated, the search will return orders with a Not Before Date less than or equal to the To Date. When both From Date and To Date are provided, the Not Before Date must be within the date range (inclusive). Therefore, orders with a Not Before Date which is greater than or equal to the From Date, and less than or equal to the To Date will be returned. To Date must be greater than or equal to the From Date.
Not After Date	Enter a date or a date range to compare against the Not After Date of the order. The To Date will default to the From Date to facilitate searching on a single date. However, if the To Date is removed, the search will return orders with a Not After Date greater than or equal to the From Date. If the From Date is left blank with the To Date populated, the search will return orders with a Not After Date less than or equal to the To Date. When both From Date and To Date are provided, the Not After Date must be within the date range (inclusive). Therefore, orders with a Not After Date which is greater than or equal to the From Date, and less than or equal to the To Date will be returned. To Date must be greater than or equal to the From Date.

Table 4-3 (Cont.) Order Review Search Criteria and Description

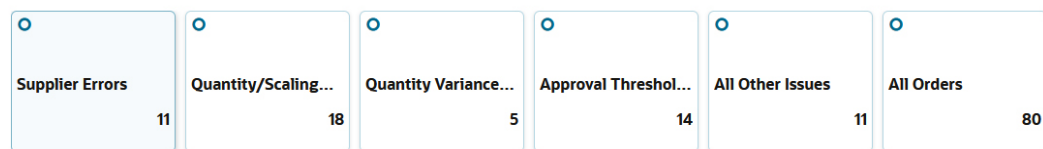
Search Field	Description
Original Approval Date	Enter a date or a date range to compare against the date the order was originally approved. The To Date will default to the From Date to facilitate searching on a single date. However, if the To Date is removed, the search will return orders with an Original Approval Date greater than or equal to the From Date. If the From Date is left blank with the To Date populated, the search will return orders with an Original Approval Date less than or equal to the To Date. When both From Date and To Date are provided, the Original Approval Date must be within the date range (inclusive). Therefore, orders with an Original Approval Date which is greater than or equal to the From Date, and less than or equal to the To Date will be returned. To Date must be greater than or equal to the From Date.
Review By Date	Enter a date or a date range to compare against the purchase order's calculated Review By Date. The Review By Date is calculated by adding the After Written Date Review Within xx Days, defined in Report Options, to the order's Written Date. The To Date will default to the From Date to facilitate searching on a single date. However, if the To Date is removed, the search will return orders with a Review By Date greater than or equal to the From Date where the order is in Worksheet or Submitted status. If the From Date is left blank with the To Date populated, the search will return orders with a Review By Date less than or equal to the To Date where the order is in Worksheet or Submitted status. When both From Date and To Date are provided, the Review By Date must be within the date range (inclusive). Therefore, orders with a Review By Date which is greater than or equal to the From Date, and less than or equal to the To Date where the order is in Worksheet or Submitted status will be returned. To Date must be greater than or equal to the From Date.

Table 4-3 (Cont.) Order Review Search Criteria and Description

Search Field	Description
Department	Enter the department you wish to use for your search. The Department filter is a concatenation of the Department Name and the Department ID. For example: Women's Clothing – 1414
Class	Enter the class you wish to use for your search. The Class filter is a concatenation of the Class Name and the Class ID. For example: Tops – 1000
Subclass	Enter the subclass you wish to use for your search. The Subclass filter is a concatenation of the Subclass Name and the Subclass ID. For example: Short Sleeve – 1000
Store	Enter the Store you wish to use for your search. The Store filter is a concatenation of the Store Name and Store ID. For example: Store A Denver – 12345
Warehouse	Enter the virtual warehouse you wish to use for your search. The Warehouse filter is a concatenation of the Warehouse Name and Warehouse ID. For example: Northeast DC – 54321

4. Click **Apply**. The orders that match the search criteria are displayed in the results section.
5. Click **Reset** to clear the search section and results.
6. Click **Cancel** to close the Filters pane.

Order Review Page – Tabs

Figure 4-11 Order Review Page – Tabs

The Order Review page can display up to six tabs. The tabs provide an additional filter to segregate orders by error or error category to facilitate the review process. The errors tracked

are those which occurred during the Approve Replenishment Orders Batch (rplapprv). Errors stop an order from being approved.

All of the Approve Replenishment Order Batch errors are assigned to an error category. The first four tabs can be assigned to either a single error, or to an error category. Each tab displays a description of the single error or the name of the error category along with the number of orders found for that error or error category. The description of the single error comes from Code Type 'OREN', the name of the error category comes from Code Type 'OREC'.

A single error or an error category is assigned to the each of the first four tabs by using the Order Review Tab Reporting Options via the Report Options page. The fifth tab is called All Other Errors, and it includes orders which have errors not covered in the first four tabs. In this way, the five tabs together include all the orders with errors which matched the selection criteria.



Note:

Orders associated with an error assigned directly to a tab appear on the Order Review page when the single error tab is selected. However, the order may also appear when an Error Category tab is selected if the error is grouped under the Error Category. This order would also be included in the count for both the single error tab and the Error Category tab.

The sixth tab is called All Orders. All the orders that match the selection criteria are displayed when this tab is selected. This gives the user the opportunity to see all orders matching the selection criteria on the page. Please note, it is possible some orders that meet the selection criteria will not have any errors. This may be because the order has recently been entered, and approval has not yet been attempted or the errors have been resolved. Therefore, the number of orders in the All Orders tab may be different than the accumulated total of the other tabs.

It is also possible that an order may have multiple errors, and the errors may correspond to different tabs. If this occurs, the order appears in the tab count for both tabs, and also appears in the dashboard report under each tab (when the tab is selected). In this scenario, the order with multiple errors is still only counted (and shows up) once in the All Orders tab.

Order Review Page – Order Report

Figure 4-12 Order Review Page – Orders Table

Errors	Actions	Order No	Supplier Site	Supplier Site Name	Status	Not Before Date	Not After Date	OTB EOW Date	Total Quantity	Total Cost	Currency
		150004	2300000001	PS- SupplierSite for Mobiu W		4/12/21	4/15/21	4/17/21	12,000	107,376	USD
		160002	2300000001	PS- SupplierSite for Mobiu W		4/12/21	4/15/21	4/17/21	12,000	107,376	USD
		200003	2400000001	PS Supp Vendor Min at Ori W		4/12/21	4/14/21	4/17/21	25,000	250,000	USD
		200004	3000000001	PS1-SupplierSite For Miobi W		4/12/21	4/15/21	4/17/21	2,500	35,000	USD
		140004	3000000001	PS1-SupplierSite For Miobi W		4/14/21	4/17/21	4/17/21	10,000	97,675	USD
		160003	3000000001	PS1-SupplierSite For Miobi W		4/14/21	4/17/21	4/17/21	10,000	97,675	USD
		45004	2200000001	Mobius Supplier Site for Sc W		4/10/21	4/13/21	4/17/21	12,000	117,210	USD
		40001	3000000001	PS1-SupplierSite For Miobi W		4/10/21	4/10/21	4/17/21	10,000	97,675	USD

Page 1 of 1 (1-8 of 8 items) |< 1 >|

The Order Review page – Orders table displays orders matching any entered selection criteria and the selected report filter tab. When you first enter the Order Review page, the first report filter tab will be selected by default.

The action menu supports actions which can be taken against orders, including navigation to the full Order workflow for editing, navigation to the [Order Review Summary Page](#), navigation to the Order Review Detail page, order approval, order deletion, cancelling all items, and reinstating all items on the order. The Error icon (



) on a row indicates there was an error when attempting to approve an offer in the replenishment batch run. To view the error(s), highlight the row of the error icon and press the Details icon



on the top right of the screen to display a Replenishment Approval Errors contextual report in the contextual pane on the right side of the page.

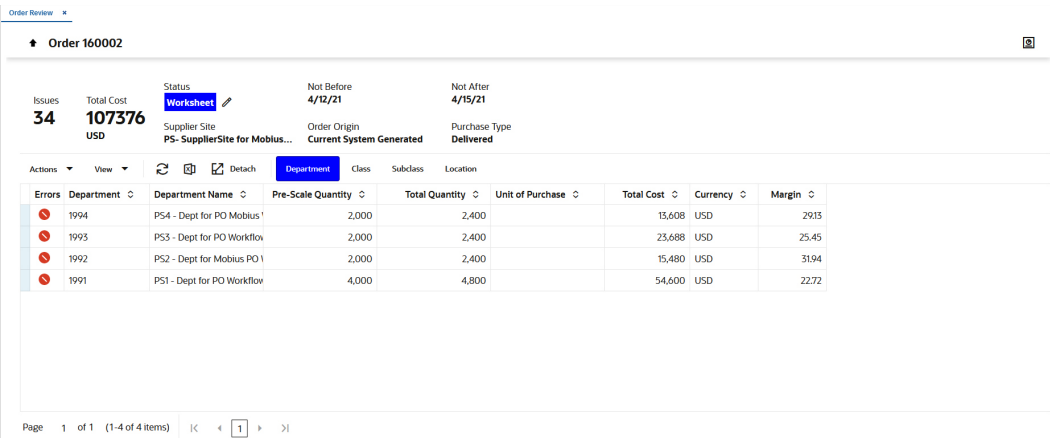
Order Review Summary Page

The Order Review Summary page displays header-level data for the selected order in the top section of the screen. The table in the bottom section of the page displays the accumulated totals of the item/locations on the order grouped by department, class, subclass or location.

Perform the following procedure to access the Order Review Summary page.

- 1. From the Task menu, select **Orders > Order Review**. The Order Review page appears.
- 2. From the Order Review page, search for an order or orders. See [Searching for Orders on the Order Review Page](#).
- 3. From the search results, select the order you want to view and select Order Review Summary from the Actions menu. The Summary page appears.

Figure 4-13 Order Review Summary Page



- From the Summary page you can view your cumulative quantities and costs by department, class, subclass, or location. From there, you can drill further into a category to get additional details on the order.

For example, you can view the order by department and see your cumulative quantities and costs by department. From there, you are able to drill further into the department with highest (or lowest) margin to increase or decrease purchases of specific items in the department if you have more room on the truck, or if you need to reduce the order to fit into a single truck.

The Order Review Summary page also provides the ability to approve an order using the edit icon next to the status field.

Order Review Detail Page

The Order Review Detail page displays item/location level data for a single order. The page can show all item/locations for the order, or it can filter data based on merchandise hierarchy (department, class or subclass) or location.

Perform the following procedure to access the Order Review Detail page.

- From the Task menu, select **Orders > Order Review**. The Order Review page appears.
- From the Order Review page, search for an order or orders. See [Searching for Orders on the Order Review Page](#).
- From the search results, select the order you want to view and select Order Review Detail from the Actions menu. The Detail page appears.

Figure 4-14 Order Review Detail Page

Errors	Item	Item Description	Location Type	Location	Margin	Total Cost	Currency	Unit of Purchase	Pre-Scaled Quantity	Original Quantity	Ordered Quantity
	101250041	PS4 - Reg Item for Scaling	S	1000000000	25.45	4,757.6	USD		400	480	480
	101250025	PS-3 Reg Item for Scaling	S	1000000000	31.94	3,096	USD		400	480	480
	101250009	PS1 - Reg Item for Errors	S	1000000000	22.72	4,800	USD		400	480	480
	101200044	P55- Reg Item for Scaling	S	1000000000	29.15	2,721.6	USD		400	480	480
	101200036	PS2- Reg Item for Scaling	S	1000000000	22.73	6,320	USD		400	480	480
	101250041	PS4 - Reg Item for Scaling	S	1000000001	25.45	4,757.6	USD		400	480	480
	101250025	PS-3 Reg Item for Scaling	S	1000000001	31.94	3,096	USD		400	480	480
	101250009	PS1 - Reg Item for Errors	S	1000000001	22.72	4,800	USD		400	480	480
	101200044	P55- Reg Item for Scaling	S	1000000001	29.15	2,721.6	USD		400	480	480

- The upper section of page displays order summary information, including the number of errors affecting the order, and various other attributes associated with the order.

The lower section of the page includes a table showing item/location details for the order. The table allows the user to directly modify the ordered quantity on each item/location combination. The table keeps track of the changes made to item/location quantities and also allows the user to recalculate (re-scale) the order. If the user is unhappy with the changes made, there is an option to revert back to the original starting quantities for the current session. Together, these features

offer a simple 'what if' capability allowing the user to quickly analyze how changes to individual item/location quantities affects the overall order.

The table also supports selecting either a level of merchandise hierarchy (department, class, subclass) or a location level and allows searching for a specific value from the action bar. For instance, selecting class '123 - Men's Tennis Shoes' filters the table to show only item/locations for items in the Men's Tennis Shoes class.

The Order Review Detail page provides the ability to approve an order using the edit icon next to the Status field or to [recalculate an offer](#).

Recalculate an Offer

This action recalculates (re-scales) the order based on the values in the Ordered Quantity column.

Perform the following procedure to recalculate an offer.

1. Access the Order Detail page. See [Order Review Detail Page](#) for information.
2. From the Order Detail page, click the recalculate icon.



The Order Recalculation popup opens

Figure 4-15 Order Recalculation Popup

Order Recalculation [X]

Recalculation Options

Recalculate Replenishment ☐

Apply Bracket Costs ☐

Apply Deals ☐ ☒ Online ☐ Offline

Order Scaling

Save Cancel

3. From the Order Recalculation popup, select the options for which to recalculate and click **Save**. Your recalculated order is displayed on the Order Review Detail table.

5

Upload/Download Orders from a Spreadsheet

Download from Staging

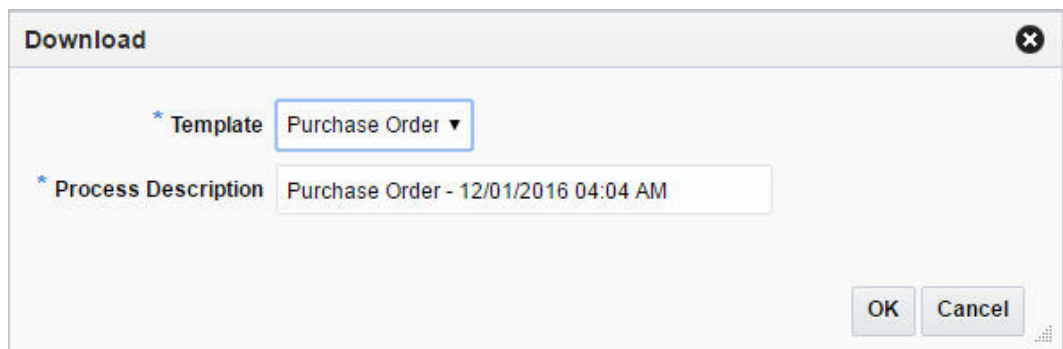
In the Order Download from Staging page you can download orders from Merchandising to a spreadsheet.

1. From the Tasks menu, select **Orders > Download from Staging**. The Order Download from Staging page displays.
2. Search for the order you want to download according to basic or advanced search criteria.

For more details regarding the basic and advanced search function in Merchandising see the [Manage Purchase Orders](#) chapter. The search results are shown in the Result section.

3. To download all orders displayed in the Result section, select **Actions > Download**. The Download page opens.
4. In the **Template** field, select, enter or search for the template you want to download.

Figure 5-1 Download Page



5. The **Process Description** field displays the default process name with the date and timestamp. You can edit the name of the download process in this field.
6. After you have entered the download information, choose one of the following options.
 - a. Click **OK** to open the spreadsheet with the selected orders on your desktop.
 - b. Click **Cancel** to reject all entries and close the Upload/Download.
7. Click **Done** to exit the Order Download from Staging page.

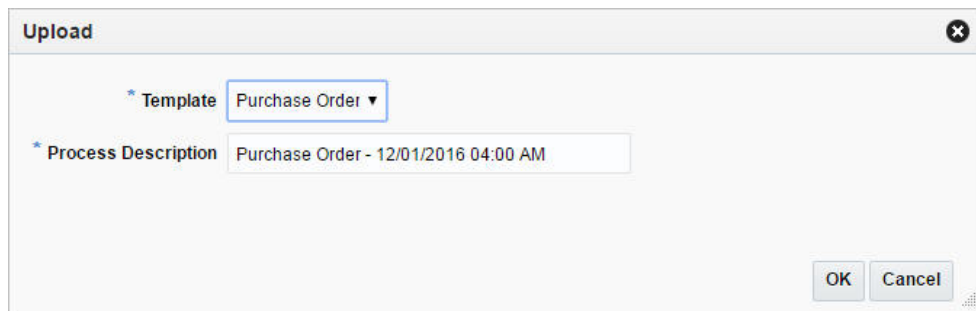
Upload from Staging

In the Order Upload from Staging page you can upload orders into Merchandising from staging tables, where additional details can be added to the order before loading them to Merchandising.

1. From the Tasks menu, select **Orders > Upload from Staging**. The Order Upload from Staging page displays.
2. Search for the order you want to upload according to basic or advanced search criteria.

For more details regards the basic and advanced search function in Merchandising, see the [Manage Purchase Orders](#) chapter. The search results are shown in the Result section.
3. To upload all orders displayed in the Result section, select **Actions > Upload**. The Upload page opens.

Figure 5-2 Upload Page



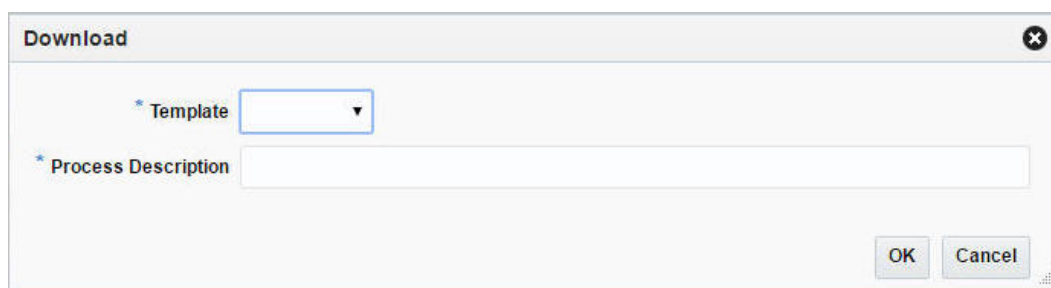
4. In the **Template** field, select, enter or search for the template you want to upload to Merchandising.
5. The **Process Description** field displays the default process name with the date and timestamp. You can edit the name of the upload process in this field.
6. After you have entered the upload information, choose one of the following options.
 - a. Click **OK** to upload the order to Merchandising. The Result section is cleared.
 - b. Click **Cancel** to cancel the upload and close the Upload page.
7. Click **Done** to close the Order Upload from Staging page.

Download from the Application

In the Order Download from Merchandising page you can download orders from Merchandising to a spreadsheet.

1. From the Tasks menu, select **Orders > Download Orders from Merchandising**. The Order Download from Merchandising page appears.
2. Search for the orders you want to download according to basic or advanced search criteria. The search results are shown in the Result section.

For more details regards the basic and advanced search function in Merchandising, see the [Manage Purchase Orders](#) chapter. The search results are shown in the Result section.
3. To download all orders displayed in the Result section, select **Actions > Download**, or use the **Download** button. The Download page appears.

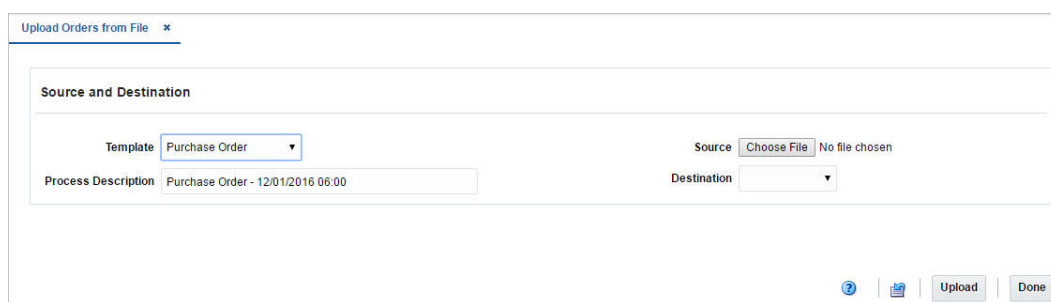
Figure 5-3 Download from Merchandising Page

4. In the **Template** field, select the template you want to download. This field is a required field.
5. The **Process Description** field displays the default process name with the date and timestamp. You can edit the name of the download process in this field. This field is a required field.
6. Then choose one of the following options.
 - Click **OK** to open the spreadsheet with the selected orders on your desktop.
 - Click **Cancel** to reject all entries and close the page.
7. Click **Done** to close the Order Download from Merchandising page.

Upload from a File

In the Orders Upload from File page you can upload a file.

1. From the Tasks menu, select **Orders > Upload Orders from File**. The Upload Orders from File page appears.

Figure 5-4 Upload Orders from File Page

2. In the **Template** field, select the template you want to upload to Merchandising tables or Staging tables.
3. The **Process Description** field displays the default process name with the date and timestamp. You can edit the name of the upload process in this field.
4. In the **Source** field, click the **Browse** button to upload the file.
5. In the **Destination** field, choose either Merchandising Tables or Staging Tables from the list.
6. Then choose one of the following options:

- Click **Upload** to upload the file to Merchandising Tables or Staging Tables.
 - Click **Revert** to undo any changes.
7. Click **Done** to close the Upload Orders from File page.

View Issues

In the Order Issues page you can view issues that occurred during the upload or download process. The Order Issue page displays the information on the upload that had an error, which column and row in the upload is in error, and a short description of the issue. Once the errors have been corrected, the data can be re-uploaded into the staging area or Merchandising as needed, using the corrected file. For errors linked to data that has already been uploaded into Merchandising, the hyper link on the order number on this screen allows a user to access the order in Merchandising to make the correction there, provided the user has edit privilege.

To view order issues which occurred during the up- or download follow the steps below.

1. From the Tasks menu, select **Foundation Data > Data Loading > Review Status**. The Data Loading Status page appears.
2. Select an order in the table. Then select **Actions > View Issues**, or use the **View Issues** button. The Order Issues page appears.
3. Click **Done** to close the Order Issues page.

6

Contract Overview

This chapter deals with the different types of contracts that can be created and maintained in Merchandising.

Contract Types

A contract is a legally binding agreement with a supplier to supply items at a negotiated price, which is assumed to be the lowest cost price of the item. In Merchandising, the contracting functions fit closely with the replenishment and ordering functions. The contract functionality enables the retailer to ensure consistent cost and timing of the purchases along with determination of early margin figures and thereby eliminating risk. It also facilitates improved supplier relationships by helping suppliers plan their production in advance. When a contract is created, the retailer can choose to source from the best contract by replenishment according to pre-defined logic. Also, since the balance of the contract is decreased when an order is written against it, commitment tracking improves. Additionally, the contract functionality assures the retailer that the cost remains consistent. Contracts can be used to create orders via replenishment or manually. Contracts can also contain items above transaction level if the 'Soft Contracting' option is enabled in the system options.

The following four contract types can be created in Merchandising with varying characteristics and different levels of flexibility:

- **Type A (Plan/Availability):** This type of contract contains a plan of manufacturing quantity by ready date. Supplier availability is matched against the plan as declared. These contracts are closed contracts, as there is a defined start and end date, and the contract is for a total purchase quantity of items. Orders are raised against the plan as suggested by replenishment requirements, provided there is sufficient supplier availability. Manual orders can also be raised.
- **Type B (Plan/No Availability):** This type of contract contains a plan of manufacturing quantity by delivery due date and dispatch-to location or locations. There can be one or more ready dates, which is the date that the items are due at the dispatch-to location. Item cost is defined and supplier availability is not required. These contracts are closed contracts, as there is defined a start and end date, and the contract is for total purchase quantity of items. Orders are raised automatically from the contract based on ready dates.
- **Type C (No Plan/No Availability):** This type of contract is an open contract with no production schedule or supplier availability declared. The contract lists the items that will be used to satisfy a total commitment cost. Orders are raised against the contract based on replenishment requirements. The user can also raise manual orders.
- **Type D (No Plan/Availability):** The type of contract is an open contract with no production schedule. The supplier declares availability as stock is ready. The contract lists the items that will be used to satisfy a total commitment cost. Orders are raised against the contract, based on replenishment requirements and supplier availability. The user can also raise manual orders.

More information can be found in these related topics:

- [Create a Contract](#) chapter

- [Manage Contracts](#) chapter
- [Add Items to a Contract](#) in the [Create a Contract](#) chapter
- [Contract Distribution](#) in the [Create a Contract](#) chapter
- ["Editing a Contract"](#) in the [Manage Contracts](#) chapter
- ["Editing the Distribution Quantity on a Contract"](#) in the [Manage Contracts](#) chapter
- ["Editing Unit Costs of Items on a Contract"](#) in the [Create a Contract](#) chapter

7

Create a Contract

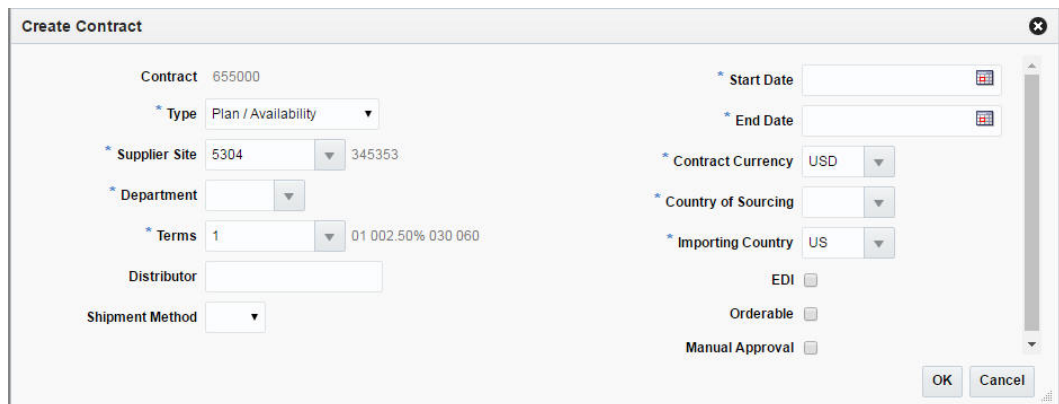
To create a contract follow the steps below:

1. From the Tasks menu, select **Orders > Contracts > Create Contract**. The Create Contract page appears.

Note:

You can also create a contract in the Contract Search page. For more information about how to create a contract in the Contract Search page, see the [Manage Contracts](#) chapter.

Figure 7-1 Create Contract Page



2. In the **Contract** field, the contract ID is filled in automatically.
3. In the **Type** field, select one of the following contract types:
 - Plan/Availability - refers to Type A contracts
 - Plan/No Availability - refers to Type B contracts
 - No Plan/No Availability - refers to Type C contracts
 - No Plan/Availability - refers to Type D contracts

Note:

When using a Type B (Plan/No Availability) contract, purchase orders are generated automatically. Manual and Replenishment orders are never created from a Type B contract.

4. In the **Supplier Site** field, enter, select or search for the supplier site. The fields such as Terms, Contract Currency and Importing Country are filled with default values based on

the entered supplier site. You can change these values, if necessary. This is a required field.

 Note:

A Type C contract (No Plan/No Availability) does not require a supplier to provide availability information; therefore, it is possible that an order can be placed that a supplier cannot fulfill.

5. In the **Department** field, enter, select or search for the department. Only items from this department can be placed on the contract. This field is a required field.
6. In the **Terms** field, enter, select or search for the contract terms, if you want to change the default value.
7. In the **Distributor** field, enter the distributor.
8. In the **Shipment Method** field, select the shipment method, for example, Air.
9. In the **Start Date** field, enter the contract start date or click the Calendar icon to specify the start date of the contract. This field is a required field.
10. In the **End Date** field, enter the contract end date or click the Calendar icon to specify the end date of the contract. This field is a required field.
11. In the **Contract Currency** field, enter, select or search for the currency of the contract, if you want to change the default value. This field is a required field.
12. In the **Country of Sourcing** field, enter, select or search for the country of sourcing for the contract. This field is a required field.
13. In the **Importing Country** field, enter, select or search for the importing country of the contract, if you want to change the default value. This field is a required field.
14. Check the **EDI** check box, to indicate that the contract is transmitted to the supplier via an EDI transaction.
15. Check the **Orderable** check box, to indicate that orders can be placed against this contract.
16. Check the **Manual Approval** check box, to indicate that all purchase orders will be created in Worksheet status and must be manually approved.

 Note:

All required fields are marked with an asterisk. If you do not enter a value for one of the required fields, an error message is shown.

17. After you have entered all the necessary data for the contract, choose one of the following options.
 - Click **OK**, to create the contract. The Contract page appears in a new tab. For more information about the Contract page, see the [Contract](#) section.
 - Click **Cancel**, to reject all entries and close the Create Contract page.

Contract

The Contract page allows you to create or maintain a contract. You can also add, edit and view the items, cost and distribution details on the contract. Moreover, you can navigate to the Parent/Diff summary screen, where you can view the details of the diffs for an item parent on a contract along with the quantity contracted, ordered, and received, as well as the ready date by diff value.

The Contract page consists of the following sections:

- [Contract Header](#)
- [Totals](#)
- [Items](#)
- [Details](#)
- [Comments](#)

Figure 7-2 Contract Page

The screenshot displays the Oracle Contract Page for Contract 185001. The page is titled "Contract 185001" and includes a "Worksheet" tab. The main section is divided into two columns. The left column contains the following fields: "Type" (Plan / Availability), "Supplier Site" (171701 | Fashion Supplier), "Department" (1414 | Button Down Shirts), "Country of Sourcing" (US), and "Importing Country" (US). The right column contains the following fields: "Start Date" (12/19/15), "End Date" (1/26/16), "Terms" (1717 | Net 30 Days), "Distributor" (empty), "Shipment Method" (empty), "EDI" (checked), "Orderable" (checked), and "Manual Approve" (checked). Below these fields, there are three expandable sections: "Totals", "Items", and "Comments". The "Totals" section shows "USD" and a currency icon. The "Items" section shows "USD". The "Comments" section is empty. At the bottom of the page, there are buttons for "Submit", "More Actions", "Save", "Save and Close", and "Cancel".

Contract Header

The Contract Header section contains the contract ID number and the status of the contract, for example Worksheet. Additionally the Contract Header section shows all values, entered in the Create Contract page. For more information about the values entered in the Create Contract page, see the start of the [Create a Contract](#) chapter.

Table 7-1 Contract Header - Fields and Description

Fields	Description
Type	Displays the contract type. Possible contract types are: • Plan/Availability • Plan/No Availability • No Plan/No Availability • No Plan/Availability For more information about the different contract types, see the Contract Overview chapter, section "Contract Types" section. This field is a view-only field.
Supplier Site	Displays the supplier site. This field is a view-only field.
Department	Displays the department. Only items from this department can be placed on the contract. This field is a view-only field.
Country of Sourcing	Displays the country of sourcing for the contract. This field is a view-only field.
Importing Country	Displays the importing country for the contract. This field is a view-only field.
Start Date	Displays the contract start date. You can edit this field, if the contract is still in Worksheet status.
End Date	Displays the contract end date. You can edit this field, if the contract is still in Worksheet status.
Terms	Displays the contract terms, for example, Net 30 Days. You can edit this field, if the contract is still in Worksheet status.
Distributor	Displays the distributor for the contract. You can edit this field, if the contract is still in Worksheet status.
Shipment Method	Displays the shipment method for the contract. You can edit this field, if the contract is still in Worksheet status.
EDI	If the EDI check box is checked, the data is exchanged electronically. You can edit this field, if the contract is still in Worksheet status.
Orderable	If the Orderable check box is checked, orders can be placed against this contract. You can edit this field, if the contract is still in Worksheet status.
Manual Approve	If the Manual Approve check box is checked, all purchase orders will be created in Worksheet status and must be manually approved. You can edit this field, if the contract is still in Worksheet status.

Totals

The Totals section contains the currency and Recalculation icon  in the title bar. Additionally the Totals section displays VAT information such as Markup % Excl. VAT,

Retail Incl. VAT, Retail Excl. VAT and Total VAT. Moreover, cost, estimated duty, estimated expenses, landed and outstanding costs are shown. For more information about the displayed VAT information, see [Table 7-2](#).



Note:

If you create a new contract, the fields in the Totals section are empty. Total cost need to be added to type C and D contracts, before you add items.

Figure 7-3 Totals Section

Contract 185001 Worksheet

USD

Totals

Markup % (Excl. VAT) 0.0

Retail (Incl. VAT) 0.00

Retail (Excl. VAT) 0.00

Total VAT 0.00

Cost 0.0000

Estimated Duty

Estimated Expenses

Landed Cost 0.0000

Outstanding Cost 0.0000

Items USD

Comments

Submit More Actions Save Save and Close Cancel

The following table describes the fields in the Totals section.

Table 7-2 Totals - Fields and Description

Fields	Description
Markup % Retail	This field shows the markup in %. When the retailer uses Simple VAT or Global Tax, this value excludes VAT.
Retail (Incl. VAT)	This field shows the total retail value of all items on the contract, including the VAT amount. This field only displays, if the retailer uses Simple VAT or Global Tax.
Retail (Excl. VAT)	This field shows the total retail value of all items on the contract, excluding the VAT amount. When the retailer uses Simple VAT or Global Tax, this value excludes VAT.

Table 7-2 (Cont.) Totals - Fields and Description

Fields	Description
Total VAT	This field shows the total VAT of the contract. This field only displays, if the retailer uses Simple VAT or Global Tax.
Cost	This field shows the total cost of the contract. If you create a Type A or B contract this field is calculated automatically. You cannot edit this field for these contract types. If you create a Type C or D contract, you can edit this field. The cost need to be added before you add items.
Estimated Duty	This field shows the estimated duties, taxes, and fees the retailer must pay to import the goods on this contract. You can specify this value for any contract type.
Estimated Expenses	This field shows the value of the estimated expenses that occurred for this contract. You can specify this value for any contract type.
Landed Cost	This field shows the sum of the cost, duty, and expenses for the shipments of the contract.
Outstanding Cost	This field shows the amount that is still open for this contract.

Items

The Items section contains the contract item, contract item description, item level, diffs and unit costs by default. You can add items to the contract in this section. For more details about how to add items to a contract, see the [Add Items to a Contract](#) section. Additionally, you can update the unit cost per item. For more information about how to update the unit cost for an item, see the [Editing Unit Costs of Items on a Contract](#) section.

Figure 7-4 Items Section

Contract 770002 Worksheet

Totals USD

Items USD

Item	Item Description	Item Level	Transaction Level	Diff 1 Type	Diff 1 Group	Diff 1	Diff 2	Diff 3	Diff 4	Unit Cost	Distribution Quantity
120550023	TestItem	Line	Line							10.0000	3,000.00

Details

Comments

Submit More Actions Save Save and Close Cancel

Details

The Details section displays the item distribution details by ready date and/or location. Columns shown are location type, location, name and ready date as well as the distribution, ordered and received quantity. The Details section is only displayed for Type A and B contracts, after items have been added and distributed.

You can edit the distribution quantity in this table. For more information about how to edit the distribution quantity, see the [Manage Contracts](#) chapter, section [Editing the Distribution Quantity on a Contract](#) section.

Figure 7-5 Items/Details Section

The screenshot displays the Oracle Contract Details section for Contract 770002. The interface includes a 'Totals' section and an 'Items' section. The 'Items' section contains a table with columns: Item, Item Description, Item Level, Transaction Level, Diff 1 Type, Diff 1 Group, Diff 1, Diff 2, Diff 3, Diff 4, and Unit Cost. Below this is a 'Details' section with a table showing distribution details for various locations and ready dates.

Item	Item Description	Item Level	Transaction Level	Diff 1 Type	Diff 1 Group	Diff 1	Diff 2	Diff 3	Diff 4	Unit Cost
120550023	TestItem	Line	Line							10.00

LocTypeDesc	Location	Name	Ready Date	DistributionQty	Qty Contracted	Qty Ordered	Qty Received
Store	305	Chicago Store	5/22/16	840.0	840.0		
Store	305	Chicago Store	5/25/16	1,260.0	1,260.0		
Wh	67766776	Ps Warehouse	5/22/16	360.0	360.0		
Wh	67766776	Ps Warehouse	5/25/16	540.0	540.0		

At the bottom of the interface, there is a 'Comments' section and a 'More Actions' menu with options: Submit, More Actions, Save, Save and Close, and Cancel.

Comments

In the Comments section you can enter necessary comments for the contract.

Contract - More Actions Menu

Use the More Actions menu to navigate to the following pages. The More Actions menu contains the following options.

Figure 7-6 Contract - More Actions Menu

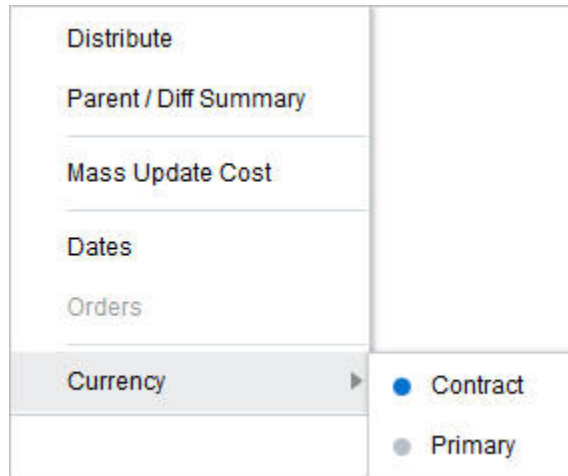


Table 7-3 Contract - More Actions Menu and Description

More Actions Menu	Description
Distribute	Opens the Contract Distribution page. For more information about how to distribute items on a contract, see the Contract Distribution section.
Parent Diff/Summary	Opens the Parent Diff/Summary page. For more information about the parent diff/summary, see the Parent/Diff Summary section.
Mass Update Cost	Opens the Mass Update page. For more information about how to update the costs for all items on a contract, see the Mass Update Cost section.
Dates	Opens the Dates page. For more information on contract dates, see the Dates section.
Orders	Opens the Contact Order List page. For more information about how to view the details of purchase orders raised against a contract, see the Manage Contracts chapter, section " View Purchase Orders for Contract ".
Currency	You can toggle between the contract and the primary currency for the monetary values shown in the page.

Adding the Total Cost to Type C and D Contracts

Before you can add items to Type C and D contracts, you have to add the total cost to the contract.

1. In the Contract page, go to the Totals section.
2. In the Cost field, enter the total cost of the contract.
3. After you have entered the total cost, choose one of the following options.
 - Add Items to the contract. For more information about how to add items to a contract, see the [Add Items to a Contract](#) section.

- Click **Save** to save the entered record.
- Click **Save and Close** to save the entered records and close the page.
- Click **Cancel** to reject all entries and close the page.

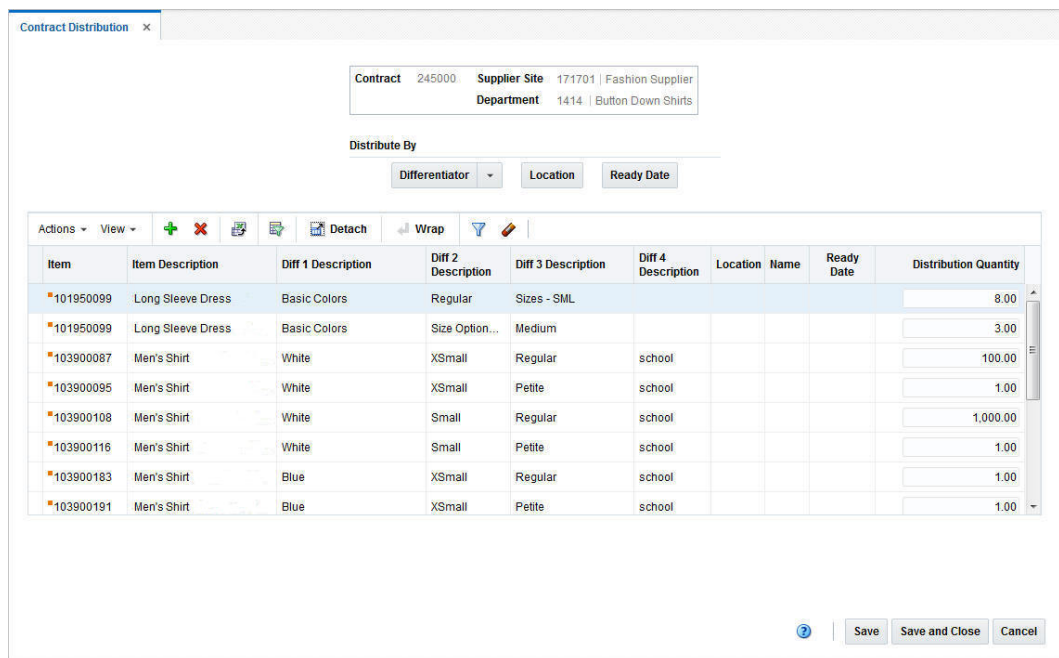
Add Items, Costs, and Locations

Add Items to a Contract

To add items to the contract, follow the steps below.

1. In the Items section of the Contract page, select **Actions > Add**, or use the Add icon . The Contract Distribution page appears.

Figure 7-7 Contract Distribution Page



Contract Distribution

Contract 245000 | Supplier Site 171701 | Fashion Supplier
Department 1414 | Button Down Shirts

Distribute By

Differentiator Location Ready Date

Item	Item Description	Diff 1 Description	Diff 2 Description	Diff 3 Description	Diff 4 Description	Location	Name	Ready Date	Distribution Quantity
101950099	Long Sleeve Dress	Basic Colors	Regular	Sizes - SML					8.00
101950099	Long Sleeve Dress	Basic Colors	Size Option...	Medium					3.00
103900087	Men's Shirt	White	XSmall	Regular	school				100.00
103900095	Men's Shirt	White	XSmall	Petite	school				1.00
103900108	Men's Shirt	White	Small	Regular	school				1,000.00
103900116	Men's Shirt	White	Small	Petite	school				1.00
103900183	Men's Shirt	Blue	XSmall	Regular	school				1.00
103900191	Men's Shirt	Blue	XSmall	Petite	school				1.00

Save Save and Close Cancel

2. In the item table, select **Actions > Add**, or use the Add icon  to add an item, reference item or list item to the contract. The Add Item page appears.

Figure 7-8 Add Item Page

- a. Select the item hierarchy level, you want to add item/items by. Items can be added at the transaction/item level, reference/item level or multiple items can be added by adding an existing item list.
- b. In the **Item/Reference Item/Item List** field, select, enter or search for the item, reference item or item list.
- c. In the **Distribution Quantity** field, enter the distribution quantity.

 Note:

The **Distribution Quantity** field is only available for type A and B contracts. For type C and D contracts, the quantity is not required.

- d. After you have entered all necessary data, choose one of the following options.
 - Click **OK** to add the item/items to the contract and exit the Add Item page. The system returns to the Contract Distribution page. The item/items is/are displayed in the item table.
 - Click **OK and Add Another** to add more items to the contract.
 - Click **Cancel** to reject all entries and close the page. The system returns to the Contract Distribution page.

 Note:

When selecting items for a contract, the number of levels in the group and the transaction level of the item group must be considered. Items above the transaction level can only be added to a contract, if the Soft Contract Indicator is selected in the System Variables.

3. After you have added all items, choose one of the following options.
 - Distribute the added items. For more information on distributing items, see the [Distributing Items of a Contract](#) section.

- Select **Save and Close** to save the entered records and close the Contract Distribution page.
- Select **Cancel** to reject all entries and close the Contract Distribution page.

Distributing Items of a Contract

To distribute the items of a contract, see the [Contract Distribution](#) section.

Verifying or Editing the Cost of the Items

Typically the contract cost is negotiated with the supplier. Therefore, the contract cost is lower than the default cost. To edit the cost of the contract item, follow the steps below.

1. In the Contract page, go to the Item section. Choose an item.
2. In the Unit Cost column, verify and/or edit the unit cost as necessary.
3. After you have entered the new unit cost for the item, choose one of the following options.
 - Click **Save** to save the entered records.
 - Click **Save and Close** to save the entered records and close the page.
 - Click **Cancel** to reject all entries and close the page.

Editing Unit Costs of Items on a Contract

Typically contract costs are negotiated with the supplier. Therefore, the contract costs are often lower than the default cost. You can update the unit cost in the Item section in the Contract page. You can either update the unit cost of a single item or for all items shown in the table.

To edit the unit cost of a single item on the contract, see the [Editing the Unit Cost of Single Items on a Contract](#) section.

To edit the unit cost for all items displayed in the Item table, see the [Mass Update Cost](#) section.

Editing the Unit Cost of Single Items on a Contract

To edit the unit cost of a single item on a contract, follow the steps below.

1. From the Tasks menu, select **Orders > Contracts > Manage Contracts**. The Contract Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The contracts that match the search criteria are displayed in the Results section.
4. In the Contract column, click the contract ID link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Contract page appears.
5. Go to the Items section and choose an item.
6. In the **Unit Cost** field enter a new unit cost amount.

7. After you have entered the new unit cost for the item, choose one of the following options.
 - Click **Save** to save the entered records.
 - Click **Save and Close** to save the entered records and close the page.
 - Click **Cancel** to reject all entries and close the page.

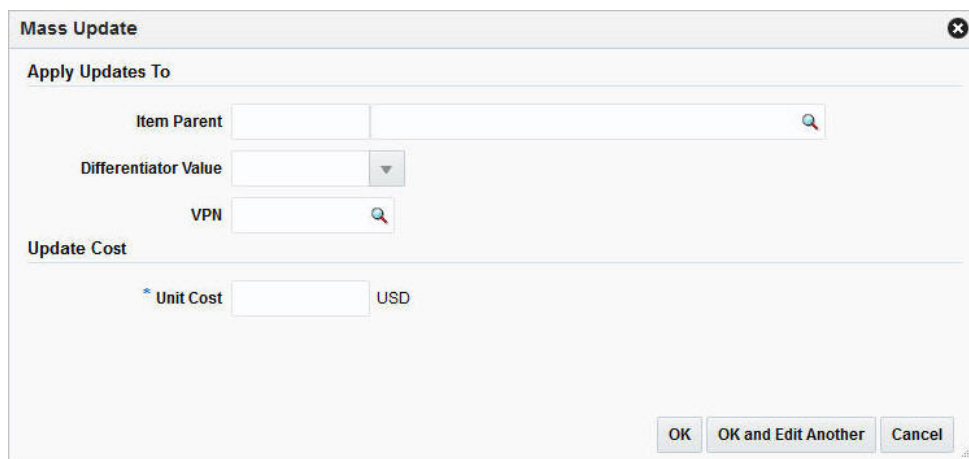
Mass Update Cost

You can update the unit costs for multiple or all items on a contract. You can apply the unit cost update by item parent, differentiator value or vendor product number (VPN).

To update the unit cost for all items on a contract follow the steps below.

1. From the Tasks menu, select **Orders > Contracts > Manage Contracts**. The Contract Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The contracts that match the search criteria are displayed in the Results section.
4. In the Contract column, click the contract ID link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Contract page appears.
5. In the Toolbar, select **More Actions > Mass Update Cost**.
6. The Mass Update page appears.

Figure 7-9 Mass Update Page



7. If you want to apply the update to the item parent, you can choose the differentiator value or VPN.
 - Update by Item Parent: In the **Item Parent** field, enter or search for the corresponding item parent.
 - Update by Differentiator Value: In the **Differentiator Value** field, enter, select or search for the corresponding diff value, such as Small.
 - Update by VPN: In the **VPN** field, enter or search for the corresponding VPN.

8. In the **Unit Cost** field, enter the new unit cost.
9. After you have entered the necessary information:
 - Click **OK** to apply the mass update by the selected value and exit the Mass Update page. The system returns to the Contract page.
 - Click **OK and Edit Another** to apply another unit cost mass update.
 - Click **Cancel** to reject all entries and exit the Mass Update page.

Contract Distribution

The Contract Distribution page allows you to add or delete items on a contract and distribute those items. Items can be distributed by item parent or diffs. Additionally for Type A contracts you can distribute the items by ready date or location. For more information about distribution items of Type A contracts, see the [Distributing Items of a Contract](#) section. For Type B contracts the items can be distributed by location and by ready date. For more information about how to distribute items of Type B contracts, see the [Distributing Items by Location](#) and [Distributing Items by Ready Date](#) sections.

The Contract Distribution page consists of the following sections:

- [Contract Distribution Header](#)
- [Distribute By](#)
- [Item Table](#)

Figure 7-10 Contract Distribution Page

Contract Distribution

Contract 770001 Supplier Site 22 | B
Department 7000 | Men's Casual Wear

Distribute By

Differentiator Ready Date

Item	Item Description	Diff 1 Description	Diff 2 Description	Diff 3 Description	Diff 4 Description	Location	Name	Ready Date
No data to display.								

Save Save and Close Cancel

Contract Distribution Header

The header section of the Contract Distribution page displays the following information:

- Contract ID
- Supplier Site
- Department

Distribute By

The Distribute By section contains options by which you can distribute the items of the contract.

Table 7-4 Distribute By Options

Buttons	Description
Differentiator	Opens list with Diff options 1 - 4.
Location	Opens the Distribute By Location page. You can distribute the item by location. For more information about this distribution method, see the Distributing Items by Location section. Only available for Type B contracts.
Ready Date	Opens the Distribute By Ready Date page. You can distribute the item by ready date. For more information about this distribution method, see the Distributing Items by Ready Date section. Only available for Type A and B contracts.

Item Table

The Item table contains the contract items. By default the table displays the contract item, item description, diff 1-4 description, location, location name and ready date as well as distribution quantity.

Contract Distribution Advanced Filter

The Contract Distribution Filter page allows you to filter the items that appear on the Contract Distribution page. You can then edit or distribute the resulting subset of items.

The Contract Distribution Advanced Filter page consists of the following sections.

- Add Filter Criteria
- Filter Criteria table
- Toolbar

Figure 7-11 Contract Distribution Advanced Filter Page

Contract Distribution Advanced Filter

Item

Blank Transactional Level Item ☐

Blank Item Parent ☐

Blank Diff1 ☐

Blank Diff2 ☐

Blank Diff3 ☐

Blank Diff4 ☐

Blank Diff1 Group ☐

Blank Diff2 Group ☐

Blank Diff3 Group ☐

Blank Diff4 Group ☐

Diff 1 ▼

Diff 2 ▼

Diff 3 ▼

Diff 4 ▼

Diff 1 Group ▼

Diff 2 Group ▼

Diff 3 Group ▼

Diff 4 Group ▼

Filter Criteria

Actions View

Item	Blank Item Compared to Tran Level		Diff 1	Diff 1 Group	Diff 2	Diff 2 Group	Diff 3	Diff 3 Group	Diff 4	Diff 4 Group	Location Type	Location	Ready Date	
	At	Above											After	Before
	☐	☐	SIZE 6											
	☐	☐			Blue									

Apply Filter **Cancel**

Filter Items

To filter the items on a contract follow the steps below.

1. From the Tasks menu, select **Orders > Contracts > Manage Contracts**. The Contract Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The contracts that match the search criteria are displayed in the Results section.
4. In the Contract column, click the contract ID link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Contract page opens.
5. In the Toolbar select **More Actions > Distribute**. The Contract Distribution page appears.
6. To filter the items shown in the item table, click the Apply Filter icon . The Contract Distribution Advanced Filter page appears.
 - a. Enter, select or search for the criteria by which you want to filter the item table.
 - b. Select **Add Filter Criteria**. The filtered criteria is added to the Filter Criteria table.

- c. To delete a criterion from the Filter Criteria table, follow the steps below.
 - Select the record.
 - Select **Actions > Delete** or use the Delete icon . You are prompted to delete the record.
 - Confirm with **Yes**. The record is removed from the Filter Criteria table.
- d. After you have added all filter criteria, choose one of the following options.
 - Click **Apply Filter**, to display the results of the filter in the Order Distribution page and close the Contract Distribution Advanced Filter page.
 - Click **Cancel**, to reject the filter criteria and close the Contract Distribution Advanced Filter page.
 - Click the Reset icon , to reject the filter criteria and stay in the Contract Distribution Advanced Filter page.
7. In the Contract Distribution page, edit the filter results as needed.
 - To clear the filter, select **Actions > Clear Filter**, or use the Clear Filter icon . All items are displayed in the item table again.
8. Choose one of the following options.
 - Click **Save and Close** to save your changes and close the Contract Distribution page.
 - Click **Cancel** to reject your changes and close the Contract Distribution page.

Distributing Items by Location



Note:

Since the automatic ordering process does not determine locations for the ordered goods from a Recommended Order Quantity, you must designate the locations for distribution with a Type B contract.

To distribute the items by location, follow the steps below.

- From the Contract page select **More Actions > Distribute**. The Contract Distribution page appears. Go to the item table.
 - If you are already in the Contract Distribution page, go to the item table.
1. In the item table select a record.
 2. In the Distribute By section, click the **Location** button. The Distribute by Location page appears.

Figure 7-12 Distribute By Location Page

Distribute By Location

Distribute By ☒ Percent ☐ Quantity ☐ Ratio

Actions ▾ View ▾ Detach

Type	Location	Name	Distribution %
No data to display.			

OK Cancel

3. In the Distribute By section, select the method of distribution, such as percent, quantity or ratio.

Note:

You can distribute by quantity only, if you did not enter a quantity in the Contract Distribution page.

4. Select **Actions** > **Add**, or use the Add icon to add locations for distribution. The Add Locations page appears.

Figure 7-13 Add Locations Page

Add Locations

*

OK OK and Add Another Cancel

- a. In the **Location Type** field, select the type of location, for example, Store or Warehouse.
- b. In the **Location** field, enter, select or search for the location.
- c. After you have selected the location, choose one of the following options.
 - Click **OK** to add the current location and close the Add Locations page. The system returns to the Distribute by Location page. The location is shown in the table.



Note:

To delete a location from the table in the Distribute By Location page, mark the location. Then select **Actions > Delete**, or use the Delete icon  to delete the location.

- Click **OK and Add Another** to add additional locations.
 - Click **Cancel** to reject all entries and close the Add Locations page. The system returns to the Distribute by Location page.
5. In the Distribute by Location page, enter the distribution percentage, quantity or ratio, depending on your distribution method. If you select the following distribution method:
 - **Percent:** Enter the percentage of the items you want at each location.
 - **Quantity:** Enter the number of items you want at each location, or the total items you want at each location.



Note:

You can distribute by quantity only if you did not enter a quantity in the Contract Distribution page.

- **Ratio:** Enter the proportion of items that you want at each location.



Note:

You can distribute to a location and enter a quantity distribution or ratio of zero (0).

6. Choose one of the following options.
 - Click **OK** to save your changes and close the Distribute by Location page. The system returns to the Contract Distribution page. The item table displays the item by location and the corresponding distribution quantity.
 - Click **Cancel** to reject your entries and close the Distribute by Location page. The system returns to the Order Distribution page.

Distributing Items by Ready Date

To distribute the items by ready date, follow the steps below.

- From the Contract page select **More Actions > Distribute**. The Contract Distribution page appears. Go to the item table.
- 1. In the item table, select a record.
- 2. In the Distribute By section, click the **Ready Date** button. The Distribute by Ready Date page appears.

Figure 7-14 Distribute by Ready Date Page

Ready Date	Distribution %
	0.0

- 3. Click **Actions > Add** or use the Add icon  to add a ready date. The Add Distribution by Ready Date page appears.

Figure 7-15 Add Distribution by Ready Date Page

- 4. In the **Ready Date** field enter or use the Calendar icon to select a ready date.
- 5. In the **Distribution %** field, enter the percentage of the goods that are due by the ready date.
- 6. Then choose one of the following options.
 - Click **OK** to add the ready date and close the Add Distribution by Ready Date page. The entered ready date and distribution percentage are shown in the table of the Distribute by Ready Date Page.

- Click **OK** to distribute the item. The system returns to the Contract Distribution page. The item table shows the item including the ready date and the corresponding distribution quantity.
- Click **Cancel** to reject all entered records and close the Ready Date Page.
- Click **OK and Add Another** to add additional ready dates for the selected item.
- Click **Cancel** to reject all entered records and close the Add Distribution by Ready Date page.

Distributing by Diff

The Distribute by Diff page allows you to distribute an item by the differentiator groups attached to the item. The user may use differentiator ranges and ratios while performing the distribution, or perform the process manually. For each selected differentiator, the distribution can be carried out on the basis of quantity, percentage or ratio.

To distribute the items previously added to the contract, by individual diffs, follow the steps below.

- From the Contract page select **More Actions > Distribute**. The Contract Distribution page appears. Go to the item table.
 - If you are already in the Contract Distribution page, go to the item table.
1. In the item table, select a record.
 2. In the Distribute By section, select a diff from the list. The Differentiator Distribution page appears.
 3. The Differentiator Distribution page contains the following sections.
 - Header: The header contains the selected diff group.
 - Diff Range: The Diff Range section contains a subset of diff groups.
 - Diff Ratio: The Diff Ratio section shows the ratio of diff IDs based on the sales history, which is used to assist in the distribution.
 4. To limit the available diffs, go to the **Diff Range** field and enter or select a diff range ID.
 5. Click **Apply**. The Available Differentiator column now only contains diff IDs limited to the chosen range.

 Note:

To apply multiple diff ranges, choose more than one valid range.

6. In the Available Differentiator area, choose one of the following options.
 - Select a diff and click the right arrow button. The diff is moved to the Diff Ratio section to the Applied Differentiator column.
 - Select all diffs and click the move all right arrow button. All diffs are moved to the Diff Ratio section to the Applied Differentiator column.

 Note:

To deselect diffs, select the individual diff or all diffs. Then use the left arrow or move all left arrow buttons. The selected diffs move from the Applied Differentiator to the Available Differentiator column.

7. Select one of the following distribution methods.
 - **Percent:** Enter the percentage of the items you want for each diff.
 - **Quantity:** Enter the number of items you want for each diff.

 Note:

You can only distribute by quantity, if you did not enter a quantity in the Order Distribution page.

- **Ratio:** Enter the proportion of the items you want for each diff.

 Note:

You can distribute the diffs and enter a percentage, quantity or ratio of zero (0).

8. After you have selected the diffs and the distribution method, choose one of the following options.
 - Click **OK** to distribute by the selected diffs and exit the Differentiator Distribution page. The system returns to the Contract Distribution page. The individual diff distributions are shown in the table.
 - Click **Cancel** to reject all entries and close the Differentiator page. The system returns to the Contract Distribution page.

Review and Approve a Contract

Recalculating and Completing the Contract

To recalculate the costs of the contract follow the steps below.

1. In the Contract page, go to the Totals section.
2. Use the Recalculate icon  to update the costs and retail value.
3. Review the entered data and choose one of the following options to complete the contract:
 - Click **Save** to save the entered records.
 - Click **Save and Close** to save the entered records and close the page.
 - Click **Cancel** to reject all entries and close the page.

Parent/Diff Summary

The Parent/Diff Summary page allows you to view the parent/diff summary of the diffs for an item parent on a contract. You can view the quantity contracted, quantity ordered, quantity received, and the ready date by diff value.

The Parent/Diff Summary page consists of the following sections:

- [Parent/Diff Summary Header](#)
- [View By](#)
- [Parent/Diff Summary Table](#)

Figure 7-16 Parent/Diff Summary Page

Contract 685004
Supplier Site 171701 | Fashion Supplier
Department 1414 | Button Down Shirts

View By: ☒ Diff 1 ☐ Diff 2 ☐ Diff 3 ☐ Diff 4

Parent Item	Description	Differentiator	Differentiator Description	Quantity			Ready Date
				Contracted	Ordered	Received	
101950099	Long Sleeve Dress Shirt	BLACK	Black	11.0	0.0	0.0	
101950099	Long Sleeve Dress Shirt	BLUE	Blue	4.0	0.0	0.0	
101950099	Long Sleeve Dress Shirt	BROWN	Brown	2.0	0.0	0.0	
101950099	Long Sleeve Dress Shirt	RED	Red	2.0	0.0	0.0	
101950099	Long Sleeve Dress Shirt	WHITE	White	2.0	0.0	0.0	
101950099	Long Sleeve Dress Shirt	YELLOW	Yellow	12.0	0.0	0.0	

Done

Parent/Diff Summary Header

The header of the Parent/Diff Summary page contains the contract ID and the supplier site as well as the department of the contract.

View By

In the View By section, you can choose to view records either by diff 1 to diff 4. Diff 1 is selected by default.

Parent/Diff Summary Table

The Parent/Diff Summary table displays the following columns by default:

- Parent Item

- Description
- Differentiator
- Differentiator Description
- Quantity
 - Contracted
 - Ordered
 - Received
- Ready Date

Viewing a Parent/Diff Summary

To view the parent/diff summary of a contract follow the steps below.

1. From the Tasks menu, select **Orders > Contracts > Manage Contracts**. The Contract Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The contracts that match the search criteria are displayed in the Results section.
4. In the Contract column, click the contract number link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Contract page appears.
5. In the Toolbar select the **More Action > Parent/Diff Summary**. The Parent Diff/Summary page appears.
6. The page displays the contract ID, the supplier site and the department in the Header section.
7. In the View By section select the differentiator 1, 2, 3 or 4.

Note:

Diff 1 is selected by default. If you selected Diff 2, the content of the summary table is refreshed to display details corresponding to differentiator 2.

8. The items are displayed in the Parent/Diff Summary table in the lower section of the page. The table contains the following information.
 - Parent Item
 - Description
 - Differentiator
 - Differentiator Description
 - Contracted, ordered and received Quantity
 - Ready Date

 Note:

Use the header row of the Parent/Diff Summary table to further narrow down the displayed records. Enter a value in the corresponding column.

To clear the filter, click the Clear All icon  .

9. To exit the Parent Diff /Summary page press **Done**.

Dates

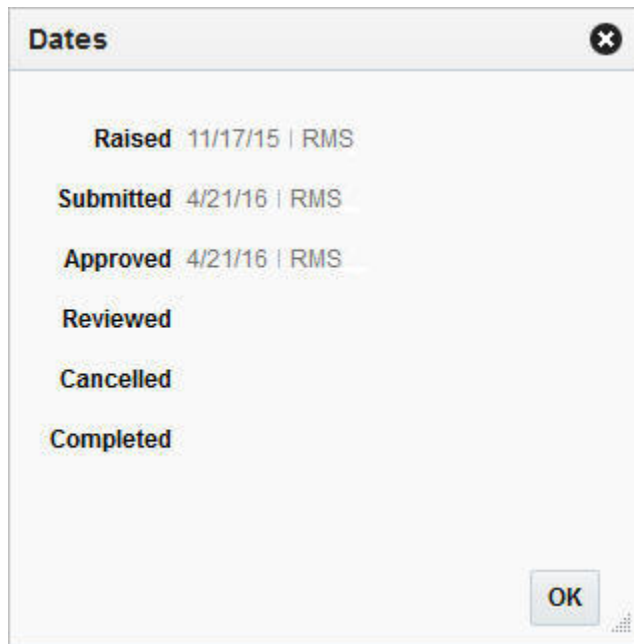
The Dates page displays the following dates:

- Raised - shows the date, the contract was issued
- Submitted - shows the date, the contract was submitted
- Approved - shows the date, the contract was approved
- Reviewed- shows the date, the contract was reviewed
- Cancelled - shows the date, the contract was cancelled.

To view the contract dates, follow the steps below:

1. From the Tasks menu, select **Orders > Contracts > Manage Contracts**. The Contract Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The contracts that match the search criteria are displayed in the Results section.
4. In the Contract column, click the contract ID link, or mark a record and select **Actions > Edit**, or use the Edit icon  . The Contract page appears.
5. In the Toolbar select **More Actions > Dates**, the Dates page appears.

Figure 7-17 Dates Page



6. View the displayed contract dates.
7. Click **OK** to close the page.

Contract Approval Process

When a contract is added to the system, it must go through a series of checks before it is accessible in the system. Depending on your user role, you may not be able to move the contract to the next status. A contract may be in any of the following statuses:

Status	Definition
Worksheet	The contract is newly created or manually placed in Worksheet status. The contract can be edited in this status.
Submitted	The contract has been completed and is pending review. Once the contract is submitted it cannot be edited.
Approved	The contract has been reviewed and has been approved. Once approved, POs can be written against the contract. If no orders have been written against the contract, the contract can be changed to Worksheet status, if any further changes are required.
Canceled	The contract has been manually closed and is no longer valid. A cancelled contract can be reinstated for re-use.
Completed	The contract is complete.

Status	Definition
Reviewed	The contract has been reviewed, but not completed. All contract types can be set to status Review after a specified period of inactivity. Type C and D contracts will also be set to status Review, if the contract has an open commitment and is past its end date. When in status Reviewed, orders can be called off the contract and retailers can choose to extend the end date or renew the supplier agreement.

- [Submitting a Contract for Approval](#)
- [Approving a Contract](#)
- [Complete a Contract](#)
- [Cancel a Contract](#)
- [Reinstate a Cancelled Contract](#)
- [Unapprove a Contract](#)

Submitting a Contract for Approval

To submit a contract for approval follow the steps below.

1. From the Tasks menu, select **Orders > Contracts > Manage Contracts**. The Contract Search page appears.
2. Restrict your search to contracts in Worksheet status.
3. Click **Search**. The contracts in Worksheet status are displayed in the Results section.
4. In the Contract column, click the contract number link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Contract page appears.
5. In the Toolbar select **Approve > Submit**.
6. When prompted to submit the contract, choose one of the following options.
 - Click **Yes** to submit the contract and close the prompt. The system returns to the Contract page. The status of the contract is changed to Submitted.
 - Click **No** to end the process and close the prompt. The system returns to the Contract page. The status of the contract did not change.
7. To end the submit process, choose one of the following options.
 - Select **Save** to save your changes.
 - Select **Save and Close** to save your changes and close the page.
 - Select **Cancel** to reject your changes and close page.

Approving a Contract

To approve a contract follow the steps below.

1. From the Tasks menu, select **Orders > Contracts > Manage Contracts**. The Contract Search page appears.
2. Restrict your search to contracts in Submitted status.
3. Click **Search**. The contracts in Submitted status are displayed in the Results section.
4. In the Contract column, click the contract number link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Contract page appears.
5. In the Toolbar select the **Approve** button.
6. When prompted to approve the contract, choose one of the following options.
 - Click **Yes** to approve the contract and close the prompt. The system returns to the Contract page. The status of the contract is changed to Approved.
 - Click **No** to end the process and close the prompt. The system returns to the Contract page. The status of the contract did not change.
7. To end the approval process, choose one of the following options.
 - Select **Save** to save your changes.
 - Select **Save and Close** to save your changes and close page.
 - Select **Cancel** to reject your changes and close the page.

8

Manage Contracts

The Manage Contracts option opens the Contract Search page. In the Contract Search page you can perform the following actions.

- Search for contracts by various search criteria
- View the entered search results
- View a contract
- Create a contract
- Create a contract from an already existing contract
- Edit a contract

You can access the Contract Search page from the Task menu, select **Orders > Contracts > Manage Contracts**. The Contract Search page appears.

The Contract Search page contains the following sections.

- Search

For more information about how to search for contracts, see the [Searching for a Contract](#) section.

- Results

Figure 8-1 Contract Search Page

The screenshot shows the 'Contract Search' page. At the top, there's a 'Search' section with filters: 'Match' (All, Any), 'Contract' (text input), 'Type' (dropdown), 'Status' (Worksheet), 'Supplier Site' (dropdown), 'Start Date' (calendar), and 'End Date' (calendar). Buttons for 'Search', 'Reset', and 'Save...' are on the right. Below is the 'Results' section with a table of contracts.

Contract	Type	Supplier Site	Supplier Site Name	Department	Department Name	Status	Start Date	End Date	Outstanding Cost	Currency
105000	No Plan / No Availability	6200	Argentina General Merch Suppl...	4601	Audio	Worksheet	6/24/16	6/30/16	3,456,000.00	ARS
105004	No Plan / No Availability	2220	Canada General Merch Suppl...	4501	Bed & Bath	Worksheet	6/13/16	6/30/16	345.00	USD
115000	Plan / Availability	5500	Australia General Merch Suppl...	4501	Bed & Bath	Worksheet	7/29/16	7/30/17		USD
115001	Plan / No Availability	5500	Australia General Merch Suppl...	4501	Bed & Bath	Worksheet	7/29/16	7/31/17		AUD
115003	Plan / No Availability	2000	Fashion Supplier Domestic Site	4501	Bed & Bath	Worksheet	7/29/16	7/31/17		USD
115004	Plan / No Availability	2000	Fashion Supplier Domestic Site	4501	Bed & Bath	Worksheet	7/30/16	7/30/17		USD
115005	Plan / Availability	2000	Fashion Supplier Domestic Site	4501	Bed & Bath	Worksheet	7/29/16	7/31/17		USD
115006	Plan / Availability	2000	Fashion Supplier Domestic Site	4501	Bed & Bath	Approved	7/29/16	7/30/17		USD
115007	Plan / No Availability	2000	Fashion Supplier Domestic Site	4501	Bed & Bath	Approved	7/29/16	8/30/17		USD
115008	No Plan / No Availability	2000	Fashion Supplier Domestic Site	4501	Bed & Bath	Approved	7/30/16	7/31/18	10,000.00	USD
115009	No Plan / Availability	2000	Fashion Supplier Domestic Site	4501	Bed & Bath	Worksheet	7/28/16	7/31/17	5,000.00	USD

At the bottom right, there are buttons for 'Done' and a help icon.

Searching for a Contract

To search for a contract:

1. From the Task menu, select **Orders > Contracts > Manage Contracts**. The Contract Search page appears.
2. You can search for a contract using basic or advanced search criteria, depending on the requirement. The basic mode is the default search mode.
 - Click **Advanced** to access the search section in advanced mode.
 - Click **Basic** to return to the basic mode.

Searching for a Contract Through the Basic Search Criteria

To search for a contract using basic search criteria:

1. Enter, select or search for one or all of the following basic search criteria.

Table 8-1 Contract Search - Basic Search Criteria and Description

Fields	Description
Match option	Check radio button All or Any. All - only contracts matching all entered search criteria are shown. Any - contracts matching any of the entered search criteria are shown.
Contract	Enter the contract number.
Type	Select the contract type. Possible contract types are: • Plan/Availability • Plan/No Availability • No Plan/No Availability • No Plan/Availability
Status	Select the contract status. Possible statuses are: • Worksheet • Submitted • Approved • Reviewed • Complete • Cancelled
Supplier Site	Enter, select or search for the corresponding supplier site.
Start Date	Enter or use the Calendar icon to select the start date of the contract.
End Date	Enter or use the Calendar icon to select the end date of the contract.

2. Click on the Saved Search list to select one of the saved search criteria. Selecting a saved search populates the search section with the saved search criteria. If the run automatically function is enabled for the search, the search is executed immediately.

You can also personalize your saved searches by selecting **Personalize**. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see [Personalize Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

3. Click **Search**. The contracts that match the search criteria are displayed in the Results section.
4. Click **Reset** to clear the search section and results.
5. Click **Save As...** to save the current search criteria. The Create Saved Search page appears.

For more information about how to save your search criteria, see [Create Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

6. Click **Done** to close the page.

Searching for a Contract Through Advanced Search Criteria

To search for a contract using advanced search criteria:

1. To search using advanced search criteria, enter or select one or all of the advanced search criteria.
2. To narrow down the search, use the list next to the search fields. For example, determine if the entered value should equal or not equal the search result.
3. Click on the Saved Search list to select one of the saved search criteria. Selecting a saved search populates the search section with the saved search criteria. If the run automatically function is enabled for the search, the search is executed immediately.

You can also personalize your saved searches by selecting **Personalize**. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see [Personalize Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

4. Click **Search**. The contracts that match the search criteria are displayed in the Results section.
5. Click **Reset** to clear the search section and results.
6. Click **Save As...** to save the current search criteria. The Create Saved Search page appears.

For more information about how to save your search criteria, see [Create Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

7. Click **Add Fields** to add more fields for the advanced search. To remove the field from the search, click the x right next to the field.
8. Click **Reorder** to change the order of the available search fields. The Reorder Search Fields page appears.
 - Select the desired search field and use the up and down arrows to rearrange the order of the fields.
 - Click **OK** to confirm the new order of the fields and close the page.
 - Click **Cancel** to reject any changes and close the page.
9. Click **Done** to close the page.

Results

The Results section lists the retrieved contracts. The Results table shows the following columns by default.

- Contract
- Type
- Supplier Site
- Supplier Site Name
- Department
- Department Name
- Status
- Start Date
- End Date
- Outstanding Cost
- Currency

Update a Contract

Editing a Contract

To edit an already existing contract, follow the steps below.

1. From the Tasks menu, select **Orders > Contracts > Manage Contracts**. The Contract Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The contracts that match the search criteria are displayed in the Results section.
4. Select a record in the Results section.
5. Choose **Actions > Edit** or use the Edit icon . The Contract page opens. The data of the selected contract is shown.
6. Edit the data as necessary.
7. After you have entered the necessary information, choose one of the following options.
 - Select **Save** to save your changes.
 - Select **Save and Close** to save your changes and close the page.
 - Select **Cancel** to reject all entries and close the page.

Copying a Contract

To copy or use an existing contract as a template for a new contract, follow the steps below.

1. From the Tasks menu, select **Orders > Contracts > Manage Contracts**. The Contract Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The contracts that match the search criteria are displayed in the Results section.
4. Select a record in the Results section.
5. Choose **Actions > Create From Existing** or use the Create From Existing icon  .
6. The Contract page opens. The data of the selected contract is shown.
7. Create a new contract based on the existing data or edit the data as necessary.
8. Then choose one of the following options.
 - Select **Save** to save all entries and create a new contract.
 - Select **Save and Close** to save all entries, create a new contract and close the Contract page.
 - Select **Cancel** to reject all entries and close the Contract page.

Editing the Distribution Quantity on a Contract

To edit the distribution quantity for Type A and Type B contracts follow the steps below.

1. From the Tasks menu, select **Orders > Contracts > Manage Contracts**. The Contract Search page appears.
2. Restrict your search for Type A and Type B contracts in Worksheet status.
3. Click **Search**. The contracts that match the search criteria are displayed in the Results section.
4. In the Contract column, click the contract ID link, or mark a record and select **Actions > Edit**, or use the Edit icon  . The Contract page appears.
5. Open the Items section.
6. In the Item section, open to the Details section.
7. In the **Distribution Qty** field, enter the quantity as necessary.
8. Then choose one of the following options.
 - Click **Save** to save your changes.
 - Click **Save and Close** to save the change and close page.
 - Click **Cancel** to reject your changes and close the page.

View Contract Cost History

In the Contract Cost History page you can search for and view the cost of items by contract.

You can access the Contract Cost History page from the Task menu, select **Orders > Contracts > Contract Cost History**. The Contract Cost History page appears.

The Contract Cost History page contains the following sections.

- Search

For more information about how to search for the cost of items by contract, see the [Searching the Cost of Items by Contract](#) section.

- Results

Figure 8-2 Contract Cost History Page

The screenshot shows the 'Contract Cost History' page. At the top, there's a 'Search' section with a 'Match' dropdown (set to 'All') and radio buttons for 'All' and 'Any'. Below this are input fields for 'Contract', 'Item', 'Description', and 'Active Date'. To the right, there are four 'Differentiator' dropdown menus (1-4). At the bottom right of the search section are 'Search', 'Reset', and 'Save...' buttons. Below the search section is a 'Results' section. It has a table with columns: Contract, Item, Description, Active Date, Unit Cost, and Currency. The table contains several rows of data. Above the table, there are 'Actions' and 'View' dropdowns, and a 'Detach' button. At the bottom right of the results section is a 'Done' button.

Contract	Item	Description	Active Date	Unit Cost	Currency
225001	100450017	Test2	4/15/2016	0.0810	USD
585002	102450045	IMPORT: REG ITEM 1	2/9/2016	5.0000	USD
335000	109550014	ZZ tran item for contract	1/21/2016	10.0000	USD
345000	109550014	ZZ tran item for contract	1/21/2016	10.0000	USD
580000	102450045	IMPORT: REG ITEM 1	2/9/2016	5.0000	USD
350000	109550014	ZZ tran item for contract	1/21/2016	10.0000	USD
580001	102450045	IMPORT: REG ITEM 1	2/9/2016	5.0000	USD
600000	102450045	IMPORT: REG ITEM 1	2/9/2016	5.0000	USD
675007	102450045	IMPORT: REG ITEM 1	2/9/2016	5.0000	USD

Searching the Cost of Items by Contract

To search for the cost of items by contract follow the steps below.

1. From the Task menu, select **Orders > Contracts > Contract Cost History**. The Contract Cost History page appears.
2. You can search for the cost of items by contract by using basic or advanced search criteria, depending on the requirement. The basic mode is the default search mode.
 - Click **Advanced** to access the search section in advanced mode.
 - Click **Basic** to return to the basic mode.

Searching for the Cost of Items by Contract Through the Basic Search Criteria

To search for the cost of items by contract using basic search criteria:

1. Enter, select or search for one or all of the following basic search criteria.

Table 8-2 Contract Cost History - Basic Search Criteria and Description

Fields	Description
Match option	Check radio button All or Any. All - only contracts matching all entered search criteria are shown. Any - contracts matching any of the entered search criteria are shown.
Contract	Enter the contract number.
Item	Enter the item number.
Description	Enter the item description.
Active Date	Enter the active date of the contract.
Differentiator 1 - 4	Enter the value for Differentiator 1 - 4.

- Click on the Saved Search list to select one of the saved search criteria. Selecting a saved search populates the search section with the saved search criteria. If the run automatically function is enabled for the search, the search is executed immediately.

You can also personalize your saved searches by selecting **Personalize**. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see [Personalize Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

- Click **Search**. The contracts that match the search criteria are displayed in the Results section.
- Click **Reset** to clear the search section and results.
- Click **Save As...** to save the current search criteria. The Create Saved Search page appears.

For more information about how to save your search criteria, see [Create Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

- Click **Done** to close the page.

Searching for the Cost of Items by Contract Through Advanced Search Criteria

To search for the cost of items by contract using basic search criteria:

- To search using advanced search criteria, enter or select one or all of the advanced search criteria.
- To narrow down the search, use the list next to the search fields. For example, determine if the entered value should equal or not equal the search result.
- Click on the Saved Search list to select one of the saved search criteria. Selecting a saved search populates the search section with the saved search criteria. If the run automatically function is enabled for the search, the search is executed immediately.

You can also personalize your saved searches by selecting **Personalize**. The Personalize Saved Searches page appears.

For more information about the Personalized Saved Search, see [Personalize Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.

- Click **Search**. The contracts that match the search criteria are displayed in the Results section.

5. Click **Reset** to clear the search section and results.
6. Click **Save As...** to save the current search criteria. The Create Saved Search page appears.
For more information about how to save your search criteria, see [Create Saved Search](#) in the *Oracle® Retail Merchandising Do the Basics User Guide*.
7. Click **Add Fields** to add more fields for the advanced search. To remove the field from the search, click the x right next to the field.
8. Click **Reorder** to change the order of the available search fields. The Reorder Search Fields page appears.
 - Select the desired search field and use the up and down arrows to rearrange the order of the fields.
 - Click **OK** to confirm the new order of the fields and close the page.
 - Click **Cancel** to reject any changes and close the page.
9. Click **Done** to close the page.

Results

The Results section lists the retrieved contracts. The Results table shows the following columns by default.

- Contract
- Item
- Description
- Active Date
- Unit Cost
- Currency

View Purchase Orders for Contract

In the Contract Order List page you can view the details of the purchase orders that have been raised against a contract. You can also change the status of each purchase order as necessary in this page.

The Contract Order List Page contains the following sections.

- [Contract Order List Header](#)
- [Order Table](#)

Figure 8-3 Contract Order List Page

Order No.	Status	Total Cost	Outstanding Cost	Total Retail	Written Date	Approved Date	Approved By	Closed Date
54103	Worksheet	490.0000	490.0000	573.75	2/14/16			
33401	Worksheet	200.0000	200.0000	275.00	1/21/16	1/21/16	RMS	

Contract Order List Header

The Header section contains the contract ID, the contract's currency and the supplier site as well as the department.

Order Table

In the Order table you can change the status of each purchase order or change the view of the Order table. By default the Order table lists the following columns.

- Order No.
- Status
- Total Cost Outstanding Cost
- Total Retail
- Written Date
- Approved Date
- Approved By
- Closed Date

Viewing or Editing the Contract Order List

1. From the Tasks menu, select **Orders > Contracts > Manage Contracts**. The Contract Search page appears.
2. Enter or select search criteria as desired to make the search more restrictive.
3. Click **Search**. The contracts that match the search criteria are displayed in the Results section.
4. In the Contract column, click the contract ID link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Contract page appears.

5. In the Contract page select **More Action > Orders**. The Contract Order List page opens. All available purchase orders for the selected contract are listed in the table. View or edit the orders for the selected contract.
 - In the Order No. column, click the link to open the Order page. View or edit the order accordingly. For more information about the Order page, see the [Create a Purchase Order](#) chapter, "Define/Enter a Purchase Order" section.
 - In the Actions menu, select **Actions > Order Details** to open the Order Details page. View or edit the order details accordingly. For more information about how to view or edit order details, see the [Create a Purchase Order](#) chapter, "Order Details" section.
 - In the Actions menu, select **Actions > Status** to change the status of the selected purchase order. For more information about how to change the status of the purchase order, see the [Changing the Status of a Purchase Order](#) section.
6. After you have viewed or edited the purchase order, choose one of the following options.
 - Click **Save** to save the changes.
 - Click **Save and Close** to save the changes and close the page.
 - Click **Cancel** to reject all entries and close the page.

Changing the Status of a Purchase Order

To change the status of a purchase order on a contract follow the steps below.

1. In the Contract Order List page, mark a purchase order.
2. Select **Actions > Status**. Change the status to one of the available ones. For example, if your selected purchase order is in Worksheet status, you can change the status to Submit or Delete.
3. After you have changed the status as desired, choose one of the following options.
 - Click **Save** to save your changes.
 - Click **Save and Close** to save the change and close the page.
 - Click **Cancel** to reject your changes and close the page.

Complete a Contract

To complete a contract follow the steps below.

1. From the Tasks menu, select **Orders > Contracts > Manage Contracts**. The Contract Search page appears.
2. Restrict your search to contracts in Approved status.
3. Click **Search**. The contracts in Approved status are displayed in the Results section.
4. In the Contract column, click the contract number link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Contract page appears.
5. In the Toolbar select the **Complete** button.

 Note:

all open orders for the contract must be closed, before the contract can be set to Complete status.

6. When prompted if you want to complete the contract, choose one of the following options.
 - Click **Yes** to complete the contract and close the prompt. The system returns to the Contract page. The status of the contract changes to Complete. The contract can no longer be changed.
 - Click **No** to end the process and close the prompt. The system returns to the Contract page. The status of the contract does not change.
7. To end the contract completion process, choose one of the following options.
 - Select **Save** to save your changes.
 - Select **Save and Close** to save your changes and close the page.
 - Select **Cancel** to reject your changes and close the page.

Cancel a Contract

To cancel a contract follow the steps below.

1. From the Tasks menu, select **Orders > Contracts > Manage Contracts**. The Contract Search page appears.
2. Restrict your search to contracts in Worksheet status.
3. Click **Search**. The contracts in Worksheet, Submitted and Approved status are displayed in the Results section.
4. In the Contract column, click the contract number link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Contract page appears.
5. In the Toolbar select the status button. Then select **Cancel**.
6. When prompted if you want to cancel the contract, choose one of the following options.
 - Click **Yes** to cancel the contract and close the prompt. The system returns to the Contract page. The status of the contract changes to Cancel.
 - Click **No** to end the process and close the prompt. The system returns to the Contract page. The status of the contract does not change.
7. To end the cancellation process, choose one of the following options.
 - Select **Save** to save your changes.
 - Select **Save and Close** to save your changes and close the page.
 - Select **Cancel** to reject your changes and close the page.

Reinstate a Cancelled Contract

To reinstate a cancelled contract follow the steps below.

1. From the Tasks menu, select **Orders > Contracts > Manage Contracts**. The Contract Search page appears.

2. Restrict your search to contracts in Cancel status.
3. Click **Search**. The contracts in Cancel status are displayed in the Results section.
4. In the Contract column, click the contract number link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Contract page appears.
5. In the Toolbar select the **Reinstate** button.
6. When prompted if you want to reinstate the cancelled contract, choose one of the following options.
 - Click **Yes** to reinstate the selected the contract and close the prompt. The system returns to the Contract page. The status of the contract changes to Worksheet.
 - Click **No** to end the process and close the prompt. The system returns to the Contract page. The status of the contract does not change.
7. To end the reinstate process, choose one of the following options.
 - Select **Save** to save your changes.
 - Select **Save and Close** to save your changes and close the page.
 - Select **Cancel** to reject your changes and close the page.

Unapprove a Contract

To unapprove an already approved contract follow the steps below.

1. From the Tasks menu, select **Orders > Contracts > Manage Contracts**. The Contract Search page appears.
2. Restrict your search to contracts in Approved status.
3. Click **Search**. The contracts in Approved status are displayed in the Results section.
4. In the Contract column, click the contract number link, or mark a record and select **Actions > Edit**, or use the Edit icon . The Contract page appears.
5. In the Toolbar select the **Approve > Unapprove**.
6. When prompted if you want to unapprove the selected contract, choose one of the following options.
 - Click **Yes** to unapprove the selected the contract and close the prompt. The system returns to the Contract page. The status of the contract changes to Worksheet.
 - Click **No** to end the process and close the prompt. The system returns to the Contract page. The status of the contract does not change.
7. To end the unapprove process, choose one of the following options.
 - Select **Save** to save your changes.
 - Select **Save and Close** to save your changes and close the page.
 - Select **Cancel** to reject your changes and close the page.

Manage Supplier Availability

Within Merchandising, there is the ability to take in information from supplier about their available inventory to fulfill purchase orders. This is primarily used in the Contracts functionality, where type A (Plan / Availability) and D (No Plan / Availability) contracts both require availability information in order to generate orders. However, it could also be used in reporting or in support of other ordering functions. Most suppliers will send this data electronically (via EDI or other), but there is also the ability to view and manage that data using the spreadsheet download and upload capability in Merchandising. This may be helpful for smaller suppliers that do not have the ability to communicate electronically. This functionality is accessed from the main Merchandising task list under Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data.

To add, update, or remove availability information, you will select the template type of Inventory from the Download Data screen and then the template Supplier Availability. Optionally you can also select a supplier site to download just their availability information. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice.

Add Supplier Availability

To add a new supplier availability entry, select the action type of Create on the Supplier Availability tab. Next enter the supplier site ID for which you are entering information. Next, enter the transaction level item ID for which the available quantity applies. Optionally you can also enter a Ref Item, which would equate to the barcode for the item. Next, the current available quantity must be entered in terms of the standard unit of measure for the item. The last two fields for this worksheet are date fields. The Last Update Date will be set by the system on upload, so can be ignored. The Last Declared date is optional but could be set to the date on which you received the availability information from the supplier, or the current date. Dates should be entered in the following format 'DD-MON-YYYY'.

Update Supplier Availability

If you would like to update the supplier availability information for an item/supplier site combination, then a similar process will be followed to that described above for entering new availability information. First, download the spreadsheet, and then find the supplier site/item combination that you want to update. In that row select the action type of Update, and then update the current available and/or last declared date in the spreadsheet.

Delete Supplier Availability

If you wish to delete a record of supplier availability, update the action column to select Delete in each of the rows you want to delete.

Uploading Changes

For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and select Foundation Data > Upload Foundation Data from the main task list. In this screen, select the template type Inventory and the template Supplier Availability. This will generate a process description automatically, but this can be updated if desired. Lastly, select the Browse button and navigate to the directory where you saved the updated spreadsheet.

To review the status of the upload and check whether any errors occurred, select the Foundation Data > Review Status task from the main task list.

See also [Download/Upload Data from Spreadsheets](#) and [View Data Loading Status](#).